



# Broker Essentials

PROGRAM GUIDE





**Jason Back**  
FOUNDER

Broker Essentials shifts the broker conversation from transaction-focused to a holistic approach to their business, incorporating client experience as a key factor.

We provide a clear path to sustainable growth by focusing on Sales, Management, and Operationalising your business.

The program is designed with principles of adult learning and neuroscience, delivered by a 30-year industry expert who has built a multi-billion-dollar brokerage.

Broker Essentials offers practical and functional learning solutions tailored to each broker's unique starting point, including webinars, microlearning, project management, and sessions with industry experts.



# The Journey

1

## Build

At this phase of your brokerage's evolution, the primary objective is to establish a solid foundation. Your attention will be directed toward the fundamental building blocks that will serve as the bedrock for your business's future expansion.

2

## Grow

You understand that planning for the future is crucial to achieving success. We'll help you prepare for potential challenges and capitalise on emerging opportunities. Here you need the tools and resources to scale your business and take it to new heights.

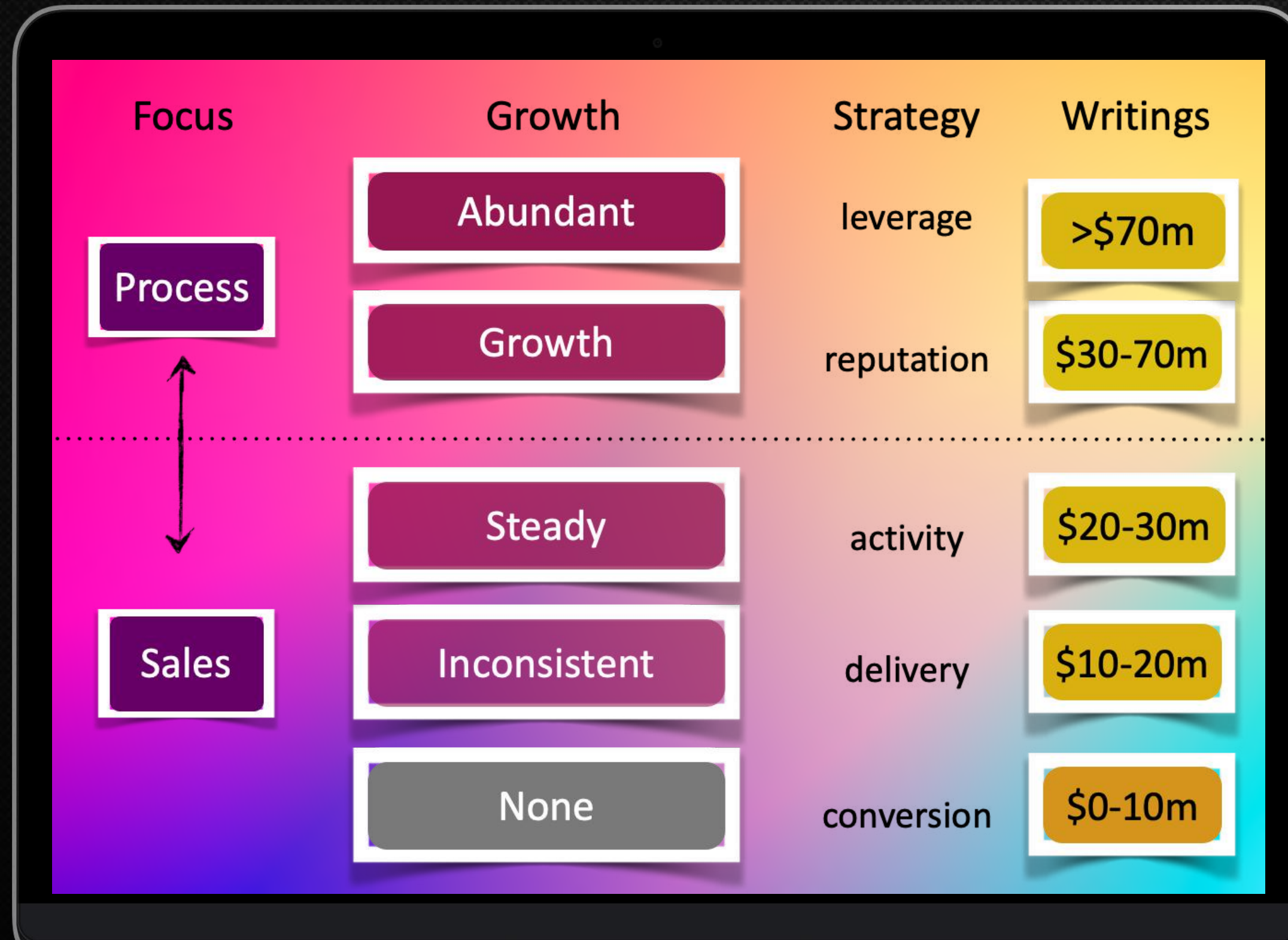
3

## Scale

As an entrepreneur, your business has grown beyond just you. Here we support your transition from being a broker to becoming an effective manager and leader. We firmly believe that success is not solely determined by the "how," but also by the "who."



# Broking Business Results ladder

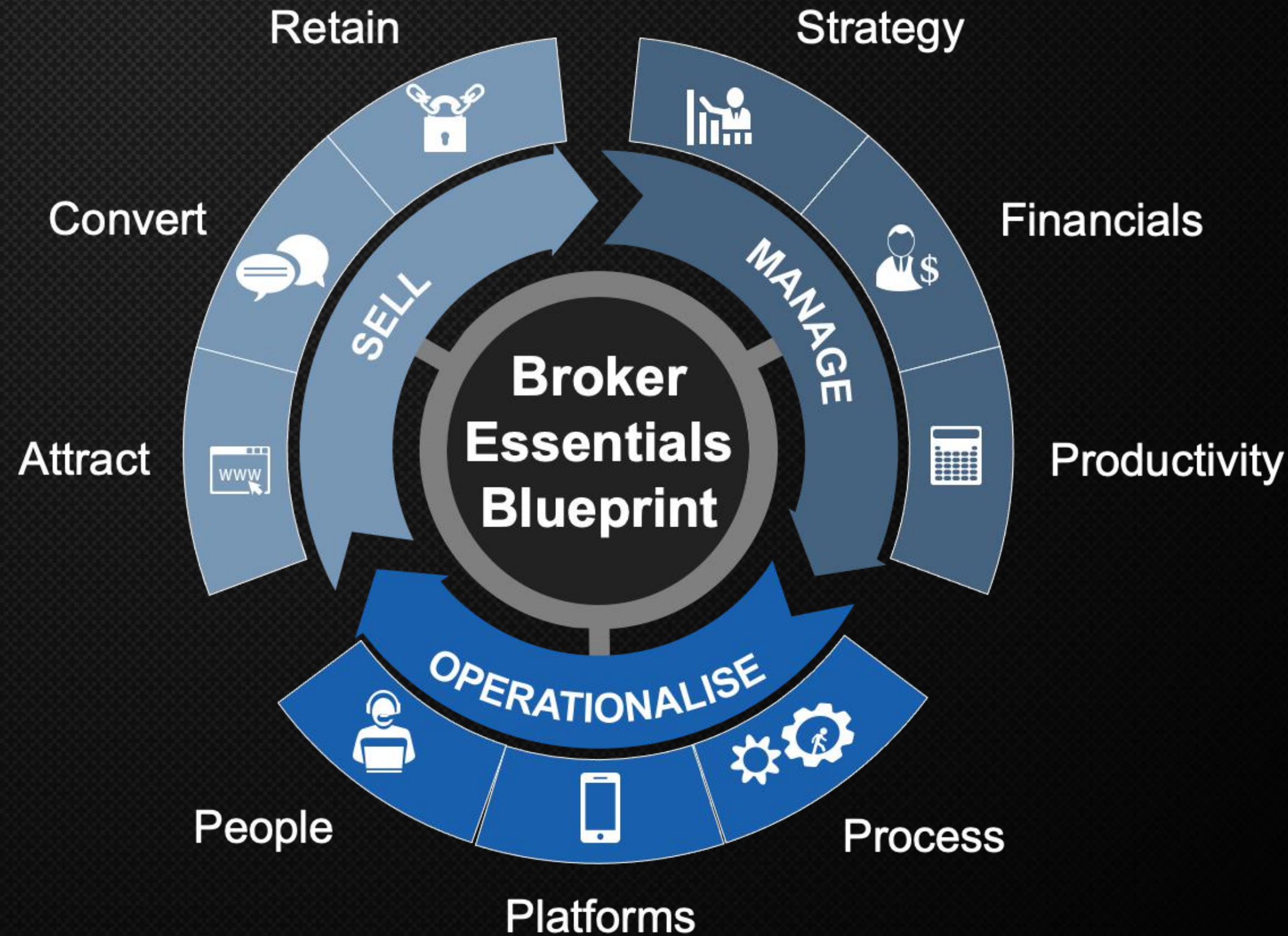


Broker Essentials offers a comprehensive learning and development program designed specifically for mortgage brokers. This program equips brokers with the latest and most effective tools, best practices, and strategies to build, grow, and scale their businesses. It is delivered by none other than Australia's foremost mortgage broker business coach, Jason Back. With Broker Essentials, mortgage brokers can enjoy a practical and functional approach to developing their skills and achieving their business goals.



# The Blueprint

Broker Essentials Revolution is designed to take you through all aspects of your business, to provide you with insights, exposure, and the right tools for the right job at the right time. The correct strategy executed at the wrong time or incorrectly won't get you to where you want to go. So let's do this right and together...





# Our Pathway

1

## Foundation

12 months  
15 moduals  
Quarterly Planning  
12 Live sessions

2

## Revolution

24 months  
30 modules  
Weekly Live session  
Quarterly half-day  
planning  
Think Tank sessions

3

## Mastermind

One-on-one with Jason  
Tailored support  
Onsite availability  
Weekly support



1

## Foundations

Unlock the potential of your mortgage brokerage with Jason Back, Australia's premier business coach. Follow his proven step-by-step guide to achieve \$30 million in settlements within the next year and build a sustainable practice. Get access to all the tools and support you need to take your business to the next level.

2

## Revolution

Join Broker Essentials Revolution and build a tribe of like-minded professionals who want to grow their businesses. With proven strategies, accountability, and access to expert guidance, you'll have everything you need to take action, access the latest tools, and resources, and connect with leading professionals in marketing, sales, staffing, and change management. Drive performance, share best practices, and achieve results with business by design.

3

## Mastermind

Take your business to the next level with tailored one-on-one coaching from Australia's number one Broker Business Mentor. Get a custom-built roadmap to success, identify opportunities for growth, and solve key business challenges. With structured weekly and monthly sessions, this program will help you achieve your goals in just 6 to 12 months.





# The Broker Essentials Revolution Roadmap

Your Focus

Scale  
\$70m - \$100 +

Grow  
\$30 - \$70m

Build  
\$0 - \$30m

	Manage	Operationalise	Sell
1	Create development plans for all staff	Create staff incentive scheme	Consider Fee for Service
2	Improve Straight Through Processing	Implement Omnichannel strategy	Refine Marketing strategy
3	Implement balanced score card approach	Review sales conversion metrics	Implement concierge model
4	Define my business culture	Create delegation process	Implement Discovery call process
5	Develop my HR process	Narrow my niche	Diversify my business offering
6	Automate workflow via tasks and templates	Upgrade website and lead magnets	Create my marketing plan for existing clients
7	My plan on a page	Design my perfect day	Client referral and feedback process
8	Create end to end loan process	Customise the Client Relationship Roadmap	Referral partnerships process
9	Create checklists and workflow guides	Create website and social media presence	Create and use a lead magnet
10			Expand referral model (Partnerships or JVs)
11			Automate lead generation
12			Define back book strategy
13			Embed Operational Excellence
14			Hire Offshore BPO
15			Review exit plan and valuation

# The Roadmap

The Broker Essentials Roadmap is a comprehensive stepped plan for your desired business model. At each stage of your journey the blueprint will support you in building (Foundation program), Growing & Scaling (Revolution program) your brokerage. The blueprint is designed to give you the maximum results based on where you are at in your business journey.

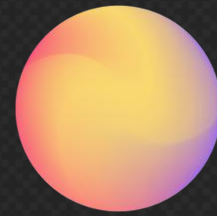


Personal | How

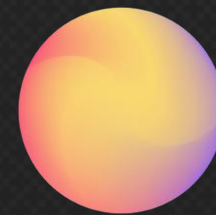


# Foundations program

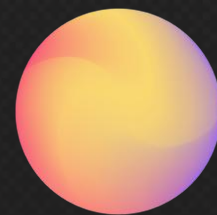
A clear pathway to \$30m



The program aims to equip brokers with a systematic approach to establishing the fundamental elements necessary for delivering consistent outcomes. Providing a step-by-step process, enables brokers to build momentum and establish a solid foundation for growth.



The program includes How to videos, Templates, Examples, and Case Studies, Guides, Quarterly Project Plans and Monthly Live Sessions with Jason Back



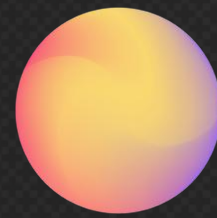
A 90-day guarantee that if you are not satisfied with what you have seen so far we will refund your investment.  
\*Conditions apply



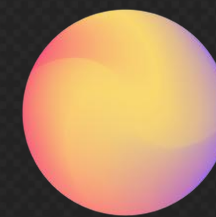


# Revolution program

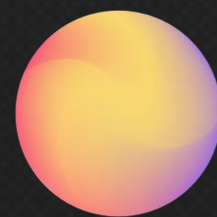
Taking you from broker  
to business owner.



As a Revolution member, you will have direct access to Jason Back, the award-winning Broker Business Mentor, for a year. Each week, you will be invited to attend special workshops that cover all aspects of your business, and you can ask Jason any questions about your business and receive expert guidance on what to do next.



You'll be connected with like-minded brokers who are equally enthusiastic about growing their businesses. You can ask any question, share your experiences, connect with the best of the best, and, of course, celebrate your successes each week.



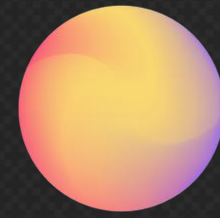
A 12-month guarantee that if you are not satisfied with what you have seen so far we will refund your investment.  
\*Conditions apply.



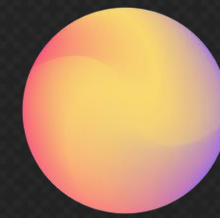


# Mastermind program

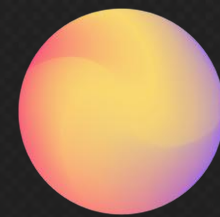
Building your business and creating a legacy



This customised program is designed to provide a step-by-step plan to elevate your business to new heights. With personalised sessions, Jason will collaborate with you to evaluate your business's performance and identify potential areas for expansion.



The business coaching program is based over a 6 to 12-month period with structured monthly sessions and laser coaching between those sessions.



Typical areas of focus include resource allocation, remuneration models, activity metrics, time audits, process inefficiencies, industry benchmarks, key staff responsibilities, staff acquisition process, growth plans, succession planning, and broker business best practices.



# Your investment in your future

## Foundation

- **\$97 per month (inc GST)**
- 3-month guarantee
- 1-year min membership

## Revoltuion

- **\$697 per month (inc GST)**
- 12-month guarantee
- 1-year min membership

## Mastermind

- **\$2500 per month (inc GST)**
- Six-month program
- Access to the Revolution Program for up to 3 of your team
- Seven monthly one-on-ones and weekly HIIT Sessions

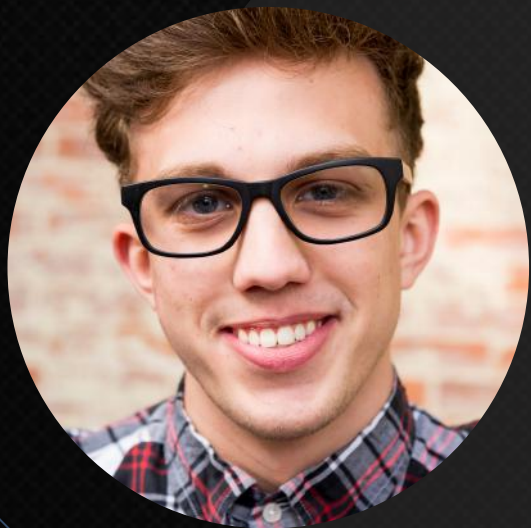
## Consultation

- Onsite L&D training
- Facilitated leadership team development
- Team Workshops
- **Price on Application**



# Who are our typical clients?

Who are the brokers we cater to?



## Foundation

Brokers with 2+ years of experience who are currently writing \$10-\$15 million annually are experiencing inconsistency and require a clear plan to achieve \$30 million within the next year.



## Revolution

Brokerages currently generating \$30 to \$70 million in settlements and are facing capacity issues and require expansion beyond their individual capabilities.



## Mastermind

Business owners with over 5-10 years of experience who are seeking a succession plan and are looking to be challenged more in the "who" aspects of their business, in addition to the "how".



# What they say...

What have our clients experienced?

## Foundation

"This course is an absolute must for anyone wanting to excel as a Finance Broker. I have loved every topic and the Friday group sessions have helped me plan and develop my business in a measured and targeted way with a direction that I did not have before. Jason's advice and knowledge have proven to be invaluable. I have loved being part of this program." Alyssa R

## Revolution

"The revolution group takes Mortgage Broking professional development to the next level. It's not one of those PD days that tell you what you should be doing, they take you through it step by step helping you to do it and keeping you accountable to implement it. They cover a very diverse range of topics to ensure you are focusing on improving all aspects of your business. I could not recommend it higher to any broker looking to take their business to the next level." Phil V

## Mastermind

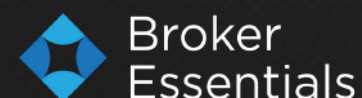
"My Coaching experience with Jason has been one of the best investments I have made in my business today. Jason shares his knowledge, wisdom, and real-life experiences with industry experts so you're getting up-to-date and professional advice on the best-in-market strategies for your business. With Jason's Advice, we have gained more time in our day and provide more efficient outcomes for clients and our referral partners. I highly recommend Jason and his program to any broker wanting to take their business to the next level." Adrian M





## Jason Back

FOUNDER



Jason is one of Australia's most prominent figures in the finance industry and a sought-after media commentator. With over 30 years of experience in the sector Jason is the Founder & Director of multi-award-winning Broker Essentials, Jason has established himself as Australia's leading mortgage broker business mentor.

He was named the Australian Broking Awards 2020 Australian Mentor of the Year, ABA Thought Leader 2022, Australian Mortgage Awards Industry Service of the year 2020 & 2022, and Mentor of the year Better Business Awards 2021 & 22. Jason is a thought leader and subject matter expert in the mortgage broking industry, and he has created a practical and targeted program for brokers and administration staff that focuses on sales through service excellence.

His Broker Essentials Revolution and Foundations programs take you through the behaviors of the nation's best brokerages, focusing on process, business management, and the client journey.





# Thank You

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