



WSB MORTGAGE SERVICES, INC.
 “Helping Seniors Live A Great Life”

Circle of Influence
Your Market Identification Guide

PURPOSE

The purpose of the *Circle of Influence* is to get you to identify your natural markets in which you may be prospecting and getting referrals. The names that you enter should represent people whom you know today. Later, you will learn proven ways to meet new people and to expand your natural markets.

INSTRUCTIONS

1. Read the sources listed on the upper left-hand corner of the forms. Select one source that suggests many names of people whom you know and begin to list their names in the spaces provided at the top of the form. Above each name, write the letter that indicates the source that suggested the name to you. Continue writing the names of people whom you know from that source until you have run out of names.
2. When you have listed all of the names from the first source, return to the first name and indicate with an X in the boxes below each name your best estimate of the information requested. When you have completed this information for the first name, go on to the next name and follow the same procedure. When you have completed the first source, go on to the next one. Should an additional name from a source that has already been entered come to mind while you are working on another source, add the new name and identify it with the proper source letter. Do not repeat names, even if they may fit more than one source.

GENERAL RULES

1. As soon as possible, fill in all 100 spaces – no less.
2. Do not list names that have been preselected on any basis; for example, the need for a mortgage. Simply list the names of those who come to mind most readily.
3. Complete all of the information requested for each name. Your Christmas card list, personal telephone list, alumni directory, club membership roster, and similar sources may be used to help you complete the list.
4. Now that you have your list; contact (ie. Call, Mail or Visit) everyone and let them know you are “Helping Seniors Live A Better Life” and can they help you help out any seniors they may know.
5. Occupation: *Circle of Influence* purposely has no catchall “other” category. When defining occupation, you must place the person’s occupation in one of the following groups:

Student	Sales Workers, for example: cashier sales clerk
Homemaker	Crafts, Operatives, Laborers, for example: baker mechanic bus driver plumber electrician truck driver printer gas station attendant
Professional, Technical, for example: accountant engineer doctor lawyer teacher sales representative	Military Service
Proprietor, Manager, Executive, for example: contractor sales manager	Service, Farmers, for example: barber police officer farm laborer waiter
Clerical, Kindred Workers, for example: mail carrier real estate agent secretary shipping clerk	Retired



