

Module 6: Building Rapport & Trust

Action Worksheet

Name: _____ Date: _____

Part 1: Trust Self-Assessment

Rate yourself honestly on each element of the Trust Equation (1-10 scale).

The Trust Equation: Trust = (Credibility + Reliability + Intimacy) ÷ Self-Orientation

Credibility - Do prospects believe I know what I'm talking about?

Current Rating: _____ / 10

Evidence of strength:

Area to improve:

Reliability - Do prospects believe I'll do what I say?

Current Rating: _____ / 10

Evidence of strength:

Area to improve:

Intimacy - Do prospects feel comfortable being open with me?

Current Rating: _____ / 10

Evidence of strength:

Area to improve:

Self-Orientation - Do I come across as focused on my agenda or theirs?

Current Rating: _____ / 10 (Lower is better!)

Evidence of strength:

Area to improve:

Part 2: Rapport-Building Techniques

Identify specific ways you'll build rapport with different types of prospects.

Mirroring Practice

Describe how you'll adjust your communication style for each scenario:

Scenario 1: Fast-Talking, High-Energy Investor

How I'll adjust my pace:

How I'll match their energy:

What I'll avoid:

Scenario 2: Slow, Methodical, Detail-Oriented Investor

How I'll adjust my pace:

How I'll match their energy:

What I'll avoid:

Scenario 3: Casual, Relationship-Focused Investor

How I'll adjust my style:

How I'll match their approach:

What I'll avoid:

Finding Common Ground

List 5 ways you can discover commonalities with prospects:

- 1.
 - 2.
 - 3.
 - 4.
 - 5.
-
-
-
-
-

My natural strengths in building connection:

Part 3: Establishing Credibility

Create your credibility toolkit - specific examples and stories you'll use to demonstrate expertise.

Case Study #1

Client Situation:

Challenge They Faced:

How We Helped:

Result:

When I'll Use This Story:

Case Study #2

Client Situation:

Challenge They Faced:

How We Helped:

Result:

When I'll Use This Story:

Social Proof Elements

List the social proof you have access to and when you'll use each:

Type of Social Proof	Specific Example	When to Use
Client testimonial	-----	-----
Success statistics	-----	-----
Industry recognition	-----	-----
Mutual connections	-----	-----
Market expertise	-----	-----

Expertise Demonstration

List 5 insightful questions you can ask that demonstrate your expertise:

1. _____
 2. _____
 3. _____
 4. _____
 5. _____
-

Part 4: DISC Adaptation Practice

For each DISC personality type, create your approach to building rapport and trust.

D - Dominant/Direct

How I'll recognize them:

My opening approach:

What I'll emphasize:

What I'll avoid:

Example opening statement:

I - Influential/Interactive

How I'll recognize them:

What I'll emphasize:

What I'll avoid:

S - Steady/Supportive

How I'll recognize them:

What I'll emphasize:

What I'll avoid:

Example opening statement:

C - Conscientious/Careful

How I'll recognize them:

My opening approach:

What I'll emphasize:

What I'll avoid:

Example opening statement:

Part 5: First Impression Framework

Design your perfect first impression for different scenarios.

Phone Call First Impression

Opening 5 seconds (greeting):

Next 10 seconds (introduction):

Next 15 seconds (establish connection):

Complete script:

Video Call First Impression

Visual preparation checklist:

- Professional background
- Good lighting
- Camera at eye level
- Professional appearance
- Eliminate distractions

Opening approach:

In-Person Meeting First Impression

Physical presence checklist:

- Professional attire
- Confident posture
- Firm handshake
- Eye contact
- Genuine smile

Opening approach:

Part 6: Maintaining Trust

Create your system for maintaining trust through consistent follow-through.

Follow-Through System

How I'll track commitments:

My response time standard:

- Emails: Within _____ hours
- Phone calls: Within _____ hours
- Promised deliverables: _____ before deadline

My proactive communication plan:

Transparency Practice

Rewrite these evasive responses into transparent, trust-building responses.

Scenario 1:

Prospect: “What are your rates?”

Evasive Response: “It depends on a lot of factors. Let me ask you some questions first.”

Your Transparent Response:

Scenario 2:

Prospect: “How long does approval take?”

Evasive Response: “We’re pretty fast. Usually not too long.”

Your Transparent Response:

Scenario 3:

Prospect: “Do you have experience with properties in [area]?”

Evasive Response (if you don’t): “We work all over.”

Your Transparent Response:

Problem-Handling Framework

Create your approach for handling common problems while maintaining trust.

Problem: Underwriting delay pushing back timeline

My response:

1. Acknowledge:

2. Take responsibility:

3. Provide solution:

4. Follow-up plan:

Problem: Rate quote changed after initial conversation

My response:

1. Acknowledge:

2. Take responsibility:

3. Provide solution:

4. Follow-up plan:

Problem: Missed a promised callback

My response:

1. Acknowledge:

2. Take responsibility:

3. Provide solution:

4. Follow-up plan:

Part 7: Rapport-Building Mistakes

Identify which mistakes you’re most prone to and create prevention strategies.

Mistake Identification

Check the mistakes you tend to make:

- Fake enthusiasm or forced rapport
- Talking too much about myself
- Using inappropriate humor
- Being too familiar too fast
- Not following up consistently
- Trying to impress rather than connect
- Rushing the relationship
- Other: _____

Prevention Strategies

For each mistake you checked, write a specific strategy to avoid it:

Mistake #1:

Prevention **Strategy:**

Mistake #2:

Prevention **Strategy:**

Mistake #3:

Prevention **Strategy:**

Part 8: Role-Play Scenarios

Complete these role-play exercises with your trainer or colleague.

Role-Play #1: Building Rapport with a D (Dominant) Personality

Scenario: Prospect is direct, impatient, results-focused. They cut you off mid-introduction.

Date Completed: _____

What worked:

What I need to improve:

Feedback received:

Role-Play #2: Building Trust with a Skeptical Prospect

Scenario: Prospect has been burned by previous lenders and is skeptical of your promises.

Date Completed: _____

What worked:

What I need to improve:

Feedback received:

Role-Play #3: Recovering from a Mistake

Scenario: You promised to send information yesterday but forgot. Prospect calls asking about it.

Date Completed: _____

What worked:

What I need to improve:

Feedback received:

Part 9: Personal Rapport Strengths & Development

Identify your natural strengths and areas for development in building rapport and trust.

My Natural Strengths

What do I already do well in building rapport?

1.

2.

3.

How I'll leverage these strengths:

My Development Areas

What do I need to improve?

1.

2.

3. _____

My specific improvement plan:

Part 10: 30-Day Rapport & Trust Building Plan

Commit to improving your rapport and trust-building skills over the next 30 days.

Week 1 Focus: First Impressions

Goal: Perfect my first 30 seconds with prospects

Actions:

- Script and practice my opening for each communication channel
- Get feedback from trainer on my first impression
- Record myself and review
- Implement improvements on _____ calls this week

Success

Metric:

Week 2 Focus: DISC Adaptation

Goal: Quickly identify personality types and adapt my approach

Actions:

- Identify DISC type of every prospect I talk to
- Adjust my communication style accordingly
- Track which adaptations work best
- Get feedback on my adaptation skills

Success

Metric:

Week 3 Focus: Credibility Building

Goal: Effectively demonstrate expertise and establish credibility

Actions:

- Use case studies on _____ calls
- Incorporate social proof naturally
- Ask more insightful questions
- Track prospect confidence level

Success

Metric:

Week 4 Focus: Trust Maintenance

Goal: Build systems for consistent follow-through

Actions:

- Implement commitment tracking system
- Respond to all communications within my time standard
- Proactively update prospects on progress
- Zero missed commitments this week

Success

Metric:

Part 11: Rapport & Trust Reflection

After each significant prospect interaction, complete this reflection.

Interaction #1

Prospect Name: _____ **Date:** _____

What I did well in building rapport:

Trust signals I noticed:

What I could improve:

Next steps to strengthen relationship:

Interaction #2

Prospect Name: _____ **Date:** _____

What I did well in building rapport:

Trust signals I noticed:

What I could improve:

Next steps to strengthen relationship:

Interaction #3

Prospect Name: _____ **Date:** _____

What I did well in building rapport:

Trust signals I noticed:

What I could improve:

Next steps to strengthen relationship:

Notes & Insights

Complete this worksheet and practice rapport-building techniques on every interaction. Review progress weekly with your trainer.