

Module 6: Building Rapport & Trust

Role-Specific Application Guide & Video Resources

Supplemental Training Material



Video Resources for Module 6

Core Rapport Building Training

“How To Build Rapport With Anyone (Full Masterclass)”

<https://www.youtube.com/watch?v=vkzIRvsMMNQ>

Duration: ~30 minutes

Complete masterclass on building real rapport with specific questions that get prospects to view you at much higher status.

“You’ re Building Rapport All Wrong (Do This Instead!)”

<https://www.youtube.com/watch?v=y5t-ZICRRC4>

Duration: ~15 minutes

Three things you must master to be a top 1% salesperson and build rapport effectively.

“How to Gain Trust & Build Rapport Faster” - 5 Minute Sales Training

<https://www.youtube.com/watch?v=yDcfvjAsm8I>

Duration: ~5 minutes

Quick, actionable techniques to gain trust and build rapport faster in sales conversations.

“Sales Training // How to Build Rapport with ANYONE” - Andy Elliott

https://www.youtube.com/watch?v=r3st2GFOO_A

Duration: ~20 minutes

How to build common ground and build a relationship with anybody, regardless of background.

“The Art of Building Rapport: From Trigger to Trust”

<https://www.youtube.com/watch?v=goHgQ8Ws7as>

Duration: ~18 minutes

The progression from initial trigger to deep trust, including Jordan Belfort's approach to rapport building.

“How To Instantly Build Rapport”

<https://www.youtube.com/watch?v=493Vj6rNT8M>

Duration: ~12 minutes

Rapport is a positive and harmonious relationship characterized by trust, understanding, and respect where communication flows easily.

Trust Equation Framework

“The Trust Equation | sales tactics that work | how to build trust”

<https://www.youtube.com/watch?v=HaqXkP9aMjs>

Duration: ~10 minutes

The mathematical equation for building TRUST—a non-negotiable when it comes to selling.

“Using and understanding the Trust Equation”

<https://www.youtube.com/watch?v=hu4QPznvaGo>

Duration: ~15 minutes

Deep dive into the trust equation used in leadership and sales training, providing deeper understanding of relationships.

“Understanding The Trust Equation for Professional”

<https://www.youtube.com/watch?v=XEB0qly0XVc>

Duration: ~8 minutes

Learn about The Trust Equation and how it impacts business relationships through understanding the framework of trust.

“Listening vs. Assuming: The Sales Trust Equation”

https://www.youtube.com/shorts/_jQsVpObTCc

Duration: ~1 minute

Your ability to help people understand unique market conditions in their world is a greater attribute towards decision-making.

Role-Specific Applications

For Shawn (Head of Lead Response) - PRIMARY FOCUS

Your Role in Module 6:

Shawn, you have **30 seconds to 2 minutes** to build enough rapport that prospects want to continue the conversation. Your rapport-building is fast, energetic, and authentic.

Key Focus Areas:

1. The 30-Second First Impression

You get one chance to make a first impression. Make it count.

First Impression Framework:

Tonality (38% of impact):

- Enthusiastic but not pushy
- Confident but not arrogant
- Warm but professional
- Energetic but not overwhelming

Words (7% of impact):

- “Thanks for reaching out to us!”
- “I’m excited to help you with this deal”
- “I’ve helped a lot of investors like you”
- “Let me ask you a few quick questions”

Body Language (55% of impact - on video calls):

- Smile genuinely
- Make eye contact
- Sit up straight
- Use open gestures
- Nod while they speak

2. Rapid Rapport Techniques

You don't have time for long rapport-building. Use these quick techniques:

Name Repetition:

- Use their name 2-3 times in first minute
- "Thanks for calling, [Name]"
- "Great question, [Name]"
- "Let me help you with that, [Name]"

Immediate Value:

- "I can help you with that"
- "We've done hundreds of deals like this"
- "Let me show you how this works"
- "I'll make this really simple for you"

Energy Matching:

- If they're excited, match their energy
- If they're cautious, be more measured
- If they're rushed, be efficient
- If they're detailed, be thorough

Common Ground (if time allows):

- "Where's the property located? I know that area"
- "Fix and flip? We love working with flippers"
- "First investment property? That's exciting!"

3. Trust-Building in 2 Minutes

Use the Trust Equation components quickly:

Credibility (30 seconds):

- "We've funded over \$X in loans for investors"
- "We specialize in DSCR and fix & flip loans"
- "I work with investors like you every day"

Reliability (30 seconds):

- “I’ ll call you back within 5 minutes if we get disconnected”
- “I’ m going to take great notes so nothing falls through the cracks”
- “I’ ll send you a summary email right after this call”

Intimacy (30 seconds):

- “I understand how stressful financing can be”
- “I know you need fast answers”
- “I’ m here to make this as easy as possible for you”

Low Self-Orientation (30 seconds):

- “My job is to find the right solution for you”
- “I’ ll be honest if we’ re not the best fit”
- “Let me understand your situation first”

4. Adapting to DISC Styles (Quick Read)

You need to quickly identify their style and adapt:

D (Dominant) - Fast, Direct, Results-Oriented:

- Get to the point immediately
- Be confident and decisive
- Focus on outcomes and speed
- “Let’ s get this done quickly”

I (Influential) - Friendly, Enthusiastic, Social:

- Match their energy and warmth
- Be personable and engaging
- Share success stories
- “This is going to be great!”

S (Steady) - Patient, Supportive, Relationship-Focused:

- Be warm and reassuring

- Don't rush them
- Build comfort and safety
- "I'm here to help you through this"

C (Conscientious) - Analytical, Detail-Oriented, Cautious:

- Be precise and accurate
- Provide specific information
- Answer questions thoroughly
- "Let me give you the exact details"

Shawn's Implementation Checklist:

- ☐ Record your opening 30 seconds on 10 calls
- ☐ Analyze: What tonality works best?
- ☐ Practice name repetition technique
- ☐ Develop energy matching skills
- ☐ Create quick credibility statements
- ☐ Practice DISC style identification
- ☐ Develop adaptation scripts for each style
- ☐ Get feedback from team on first impressions
- ☐ Track: Which approaches lead to best conversations?
- ☐ Refine based on conversion data

Shawn's Video Resources:

- Watch "How To Instantly Build Rapport" for quick techniques
- Study "How to Gain Trust & Build Rapport Faster" for 5-minute framework
- Review "You're Building Rapport All Wrong" for common mistakes to avoid

Shawn's Success Metric:

90%+ of prospects stay engaged through full qualification call. 80%+ of qualified prospects agree to next step with Ronald. Positive tone and energy maintained on 100% of calls.

For Ronald (Head of Client Relationships) - SUPPORTING ROLE (But Critical)

Your Role in Module 6:

Ronald, rapport and trust are your **competitive advantages**. You have time to build deep relationships. This is where you differentiate from competitors.

Key Focus Areas:

1. Deep Rapport Building

You build rapport throughout the entire relationship, not just the first call.

Rapport Building Timeline:

First Call (Discovery):

- Spend 5-10 minutes on pure rapport before business
- Find genuine common ground
- Share relevant personal connection
- Establish human-to-human connection

Second Call (Presentation):

- Reference rapport points from first call
- Build on relationship foundation
- Show you remembered details about them
- Deepen personal connection

Throughout Relationship:

- Remember personal details (kids, hobbies, goals)
- Check in beyond just business
- Celebrate their wins
- Support them through challenges

2. The Trust Equation Mastery

You deliberately build trust across all four dimensions:

Credibility (Expertise & Competence):

- Share relevant experience and knowledge
- Provide market insights and data
- Demonstrate understanding of their strategy
- Show you've solved similar problems
- Use case studies and success stories
- Be the expert they need

Actions:

- "I've worked with 50+ fix & flip investors"
- "Here's what I'm seeing in the market right now"
- "Let me show you how we structured a similar deal"
- "Based on your strategy, here's what I recommend"

Reliability (Consistency & Follow-Through):

- Do exactly what you say you'll do
- Follow up when you say you will
- Be responsive and available
- Meet deadlines consistently
- Keep them informed proactively

Actions:

- Send promised information within 24 hours
- Call back at exact scheduled time
- Provide updates even when there's no news
- Be available when they need you
- Never make promises you can't keep

Intimacy (Safety & Connection):

- Create safe space for honest conversation
- Show genuine care for their success
- Listen deeply without judgment

- Share appropriately about yourself
- Build emotional connection

Actions:

- “I can tell this deal is really important to you”
- “Help me understand what’s really concerning you”
- “I want to make sure this is right for you”
- “I’m invested in your success”
- “Let’s figure this out together”

Low Self-Orientation (Focus on Them, Not You):

- Put their interests first
- Be honest even when it costs you
- Recommend what’s best for them
- Don’t push for your benefit
- Be a trusted advisor, not just a salesperson

Actions:

- “This might not be the right loan for you, and here’s why”
- “Let me show you all your options, even if you don’t use us”
- “I want to make sure you’re making the best decision”
- “My goal is your success, not just closing this deal”
- “If I’m not the right fit, I’ll tell you”

3. Advanced Rapport Techniques

You use sophisticated rapport-building methods:

Mirroring & Matching:

- Match their communication pace
- Mirror their language patterns
- Adapt to their formality level
- Reflect their energy level

Active Listening Signals:

- Paraphrase what they say
- Ask clarifying questions
- Acknowledge their feelings
- Show you're fully present

Vulnerability & Authenticity:

- Share relevant challenges you've faced
- Admit when you don't know something
- Be real, not scripted
- Show your human side

Consistent Value-Add:

- Send relevant articles or insights
- Introduce them to helpful contacts
- Provide deal analysis even before they're a client
- Be a resource, not just a vendor

4. DISC Personality Adaptation

You deeply adapt your approach to each personality type:

D (Dominant) Investor:

Characteristics:

- Fast-paced, results-driven
- Wants control and options
- Impatient with details
- Focused on bottom line

Your Approach:

- Be direct and efficient
- Present options and let them choose

- Focus on results and ROI
- Don't waste their time
- Give them control of process

Communication Style:

- “Here are three options. Which works best for you?”
- “Bottom line: This saves you \$X and closes in 10 days”
- “You’re in control. Tell me what you need”

I (Influential) Investor:

Characteristics:

- Enthusiastic and social
- Relationship-focused
- Optimistic and trusting
- Likes to talk and share

Your Approach:

- Be warm and engaging
- Build personal relationship
- Share stories and experiences
- Be enthusiastic about their vision
- Make it fun and exciting

Communication Style:

- “I love your vision for this project!”
- “Let me tell you about another investor who did something similar”
- “This is going to be amazing when it’s done”

S (Steady) Investor:

Characteristics:

- Patient and methodical

- Risk-averse and cautious
- Values relationships and stability
- Needs reassurance

Your Approach:

- Be patient and supportive
- Don't rush the process
- Provide reassurance and security
- Build deep trust over time
- Show you'll be there for them

Communication Style:

- "We'll take this one step at a time"
- "I'll be with you through the entire process"
- "Let me show you how we've helped others like you"
- "There's no pressure—let's make sure this is right"

C (Conscientious) Investor:**Characteristics:**

- Analytical and detail-oriented
- Wants data and documentation
- Risk-averse through analysis
- Values accuracy and precision

Your Approach:

- Provide detailed information
- Back up claims with data
- Be precise and accurate
- Give them time to analyze
- Answer all questions thoroughly

Communication Style:

- “Here’ s the detailed breakdown of all costs”
- “Let me send you the complete documentation”
- “The exact rate is X% with Y points”
- “Take your time to review everything”

Ronald’ s Implementation Checklist:

- ☐ Study Trust Equation and apply to every interaction
- ☐ Create rapport-building checklist for each call
- ☐ Develop DISC identification skills
- ☐ Create adaptation strategies for each DISC type
- ☐ Build personal connection tracking in CRM
- ☐ Practice mirroring and matching techniques
- ☐ Develop vulnerability and authenticity
- ☐ Create value-add resource library
- ☐ Track: Which rapport techniques lead to closes?
- ☐ Get client feedback on relationship quality

Ronald’ s Video Resources:

- Watch “How To Build Rapport With Anyone (Full Masterclass)” as foundational training
- Study “The Trust Equation | sales tactics that work” to master trust framework
- Review “The Art of Building Rapport: From Trigger to Trust” for progression
- Study “Using and understanding the Trust Equation” for deep application

Ronald’ s Success Metric:

95%+ client satisfaction scores. 70%+ of clients provide referrals within 90 days. 80%+ of clients return for second deal. Recognized as “trusted advisor” not just “lender.”

For Tamara (Head of Operations) - SUPPORTING ROLE

Your Role in Module 6:

Tamara, your job is to build systems that enable rapport and trust at scale through reliable processes and consistent experiences.

Key Focus Areas:

1. Reliability Systems

Build systems that demonstrate reliability:

Follow-Up Automation:

- Automated email confirmations
- Scheduled follow-up reminders
- Task creation for commitments made
- Deadline tracking and alerts
- Proactive status updates

Communication Systems:

- Response time tracking
- SLA monitoring (respond within X hours)
- Escalation for missed deadlines
- Automated status updates to clients
- Multi-channel communication options

2. Consistency & Quality Assurance

Ensure consistent, high-quality experiences:

Process Documentation:

- Standard operating procedures for all interactions
- Communication templates (but personalized)
- Quality standards for each touchpoint
- Escalation procedures for issues

Quality Monitoring:

- Review calls for rapport and trust-building
- Track client satisfaction scores
- Monitor response times and follow-through
- Identify and address consistency gaps

3. Trust-Building Through Transparency

Create systems that build trust through transparency:

Client Portal:

- Real-time loan status visibility
- Document upload and tracking
- Communication history
- Next steps and timeline

Proactive Communication:

- Automated milestone updates
- Problem alerts before clients ask
- Regular status reports
- Clear expectations setting

4. Relationship Tracking & Personalization

Enable team to build personal relationships at scale:

CRM Relationship Fields:

- Personal interests and hobbies
- Family information (kids, spouse)
- Investment goals and strategy
- Communication preferences
- Important dates (birthdays, anniversaries)
- Referral sources and relationships

Relationship Touchpoint Automation:

- Birthday/anniversary reminders

- Quarterly check-in tasks
- Referral request triggers
- Value-add content delivery
- Relationship milestone celebrations

Tamara's Implementation Checklist:

- ☐ Build follow-up automation workflows
- ☐ Set up response time tracking and SLAs
- ☐ Create communication consistency standards
- ☐ Implement quality monitoring process
- ☐ Build client portal for transparency
- ☐ Set up proactive communication automation
- ☐ Create CRM relationship tracking fields
- ☐ Implement relationship touchpoint automation
- ☐ Track: System reliability metrics
- ☐ Monitor: Client satisfaction and trust indicators

Tamara's Video Resources:

- Watch “Understanding The Trust Equation” to understand what systems need to support
- Study “Using and understanding the Trust Equation” for reliability component
- Review CRM relationship management tutorials

Tamara's Success Metric:

100% follow-through on commitments tracked. 95%+ response time SLA achievement. Client satisfaction scores improve 20%+ due to system reliability.

For CEO (Strategic Oversight) - LEADERSHIP ROLE

Your Role in Module 6:

As CEO, you set the culture of rapport and trust, model it in your behavior, and hold the team accountable to high relationship standards.

Key Focus Areas:

1. Culture of Trust

Create organizational culture that values relationships:

Company Values:

- Client success over short-term profit
- Honesty even when it costs us
- Relationships over transactions
- Long-term thinking over quick wins

Team Behaviors:

- Celebrate relationship wins, not just revenue
- Recognize team members who build deep trust
- Share client success stories
- Call out trust-building behaviors

2. Personal Relationship Building

Model rapport and trust-building:

Strategic Relationships:

- Build executive-level relationships with key clients
- Personally manage top 10% of client relationships
- Develop deep partnerships with referral sources
- Be accessible to important clients

Relationship Investment:

- Take key clients to lunch/dinner
- Attend their events and milestones
- Provide strategic advice beyond lending
- Make introductions to your network
- Be a true partner in their success

3. Team Coaching on Rapport & Trust

Develop team's relationship-building skills:

Weekly Coaching:

- Review calls for rapport and trust-building
- Provide feedback on relationship quality
- Role play challenging rapport scenarios
- Share best practices across team

Coaching Focus:

- Shawn: First impression and energy
- Ronald: Deep trust-building and DISC adaptation
- Tamara: System reliability and consistency

4. Trust-Based Decision Making

Make decisions that build long-term trust:

Pricing Decisions:

- Be transparent about pricing
- Don't bait and switch
- Honor quotes even when it costs you
- Be fair and consistent

Problem Resolution:

- Take responsibility for mistakes
- Fix problems quickly and completely
- Go above and beyond to make it right
- Learn from issues and improve

Strategic Decisions:

- Choose long-term relationships over short-term profit
- Be honest even when it's uncomfortable
- Do what's right for clients, not just what's profitable

- Build reputation as most trusted lender

CEO Implementation Checklist:

- ☐ Define company values around trust and relationships
- ☐ Create recognition program for relationship excellence
- ☐ Identify top 10% of client relationships to personally manage
- ☐ Schedule monthly relationship-building activities
- ☐ Conduct weekly coaching on rapport and trust
- ☐ Review and improve trust-based policies
- ☐ Monitor client trust and satisfaction metrics
- ☐ Make strategic decisions that prioritize trust
- ☐ Model relationship-building behaviors
- ☐ Build company reputation as most trusted lender

CEO Video Resources:

- Watch “How To Build Rapport With Anyone (Full Masterclass)” for personal development
- Study “The Trust Equation | sales tactics that work” for strategic framework
- Review “The Art of Building Rapport: From Trigger to Trust” for organizational application

CEO Success Metric:

Company recognized as “most trusted lender” in market. 80%+ client retention rate. 50%+ of new business from referrals. Net Promoter Score (NPS) of 70+.



Rapport & Trust Metrics by Role

Shawn's Key Metrics:

Metric	Target	Measurement
First Call Engagement Rate	90%+	% who stay on full call
Positive Tone Maintenance	100%	All calls energetic/warm
Handoff Acceptance Rate	80%+	% who agree to Ronald call
Client Feedback on First Impression	4.5 ⁵ +	Post-close survey

Ronald's Key Metrics:

Metric	Target	Measurement
Client Satisfaction Score	4.8 ⁵ +	Post-close survey
Referral Rate	70%+	% of clients who refer
Repeat Client Rate	80%+	% who return for 2nd deal
"Trusted Advisor" Rating	90%+	Client perception survey
Relationship Depth Score	4.5 ⁵ +	CRM relationship tracking

Tamara's Key Metrics:

Metric	Target	Measurement
Follow-Through Rate	100%	Commitments kept
Response Time SLA	95%+	Within defined timeframe
System Reliability	99%+	Uptime and accuracy
Process Consistency	95%+	Adherence to standards

CEO' s Key Metrics:

Metric	Target	Measurement
Net Promoter Score (NPS)	70+	Client survey
Client Retention Rate	80%+	% of repeat clients
Referral-Sourced Revenue	50%+	% from referrals
Market Reputation	Top 3	Industry surveys/reviews

Additional Video Resources by Topic

For First Impressions:

- Search YouTube: “first impression sales techniques”
- Search YouTube: “sales call opening techniques”
- Search YouTube: “tonality in sales”

For Active Listening:

- Search YouTube: “active listening sales”
- Search YouTube: “empathetic listening techniques”
- Search YouTube: “listening skills training”

For DISC Personalities:

- Search YouTube: “DISC personality sales”
- Search YouTube: “selling to different personalities”
- Search YouTube: “DISC communication styles”

For Relationship Building:

- Search YouTube: “long-term client relationships”
- Search YouTube: “relationship-based selling”

- Search YouTube: “client relationship management”
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Trust Equation Deep Dive

The Formula:

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

How to Increase Trust:

Increase Credibility:

- Share relevant expertise and experience
- Provide data and insights
- Demonstrate competence
- Use case studies and testimonials
- Be the expert they need

Increase Reliability:

- Do what you say you’ ll do
- Follow up consistently
- Meet deadlines
- Be responsive
- Keep them informed

Increase Intimacy:

- Create emotional safety
- Show genuine care
- Listen deeply
- Be vulnerable and authentic
- Build human connection

Decrease Self-Orientation:

- Focus on their needs, not your commission

- Be honest even when it costs you
 - Recommend what's best for them
 - Don't push for your benefit
 - Be a trusted advisor
-



Rapport-Building Checklist

For Shawn (First 2 Minutes):

- ☐ Use their name 2-3 times
- ☐ Match their energy level
- ☐ Establish credibility quickly
- ☐ Show enthusiasm for helping
- ☐ Create immediate value
- ☐ Identify DISC style
- ☐ Adapt communication approach

For Ronald (Throughout Relationship):

- ☐ Spend time on pure rapport building
- ☐ Find genuine common ground
- ☐ Demonstrate expertise (credibility)
- ☐ Follow through on all commitments (reliability)
- ☐ Create emotional safety (intimacy)
- ☐ Put their interests first (low self-orientation)
- ☐ Adapt to their DISC personality
- ☐ Build personal connection
- ☐ Provide consistent value
- ☐ Remember personal details

For Tamara (System Design):

- ☐ Automate follow-up commitments
- ☐ Track response times
- ☐ Monitor follow-through
- ☐ Ensure process consistency
- ☐ Enable personalization at scale
- ☐ Create transparency systems
- ☐ Track relationship touchpoints

For CEO (Culture & Strategy):

- ☐ Model trust-building behaviors
- ☐ Make trust-based decisions
- ☐ Coach team on relationships
- ☐ Recognize relationship excellence
- ☐ Build strategic relationships personally
- ☐ Monitor trust and satisfaction metrics

Key Takeaways by Role

Shawn: You have 30 seconds to 2 minutes to build enough rapport that prospects want to continue. Be energetic, authentic, and immediately valuable. Master the fast rapport techniques.

Ronald: Rapport and trust are your competitive advantages. Use the Trust Equation deliberately. Adapt deeply to DISC personalities. Build relationships that last beyond transactions.

Tamara: Your systems enable trust at scale. Build reliability through consistent processes. Create transparency through technology. Enable personalization through smart CRM design.

CEO: You set the culture of trust. Model it, coach it, recognize it, and make decisions that prioritize long-term relationships over short-term profit. Build a company known for being trustworthy.



Next Steps

Shawn:

1. Record your first 30 seconds on 20 calls
2. Analyze what works and what doesn't
3. Practice DISC style identification
4. Develop quick adaptation techniques
5. Get feedback from prospects and team

Ronald:

1. Study the Trust Equation deeply
2. Assess yourself on each dimension
3. Identify your weakest trust area
4. Develop improvement plan
5. Practice DISC adaptation with each client
6. Track relationship depth in CRM

Tamara:

1. Audit current systems for reliability
2. Identify gaps in follow-through
3. Build automation for commitments
4. Create transparency systems
5. Enable relationship tracking in CRM

CEO:

1. Define company values around trust

2. Model trust-building behaviors
 3. Coach team on rapport and trust
 4. Make trust-based strategic decisions
 5. Monitor trust and satisfaction metrics
 6. Build reputation as most trusted lender
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This supplemental guide should be used alongside the Module 6 Training Guide and Worksheet. Rapport and trust are the foundation of all successful sales relationships—master these and you master the sale.