Module 7: Presenting Solutions

Action Worksheet

Name: ______________________________
Date: ______________________________

Part 1: Presentation Self-Assessment

Rate yourself on each presentation skill (1=Needs Improvement, 5=Excellent):

Skill	Rating (1-5)	Notes
Recapping discovery insights		
Connecting solutions to needs		
Customizing presentations		
Using storytelling techniques		
Creating engaging visuals		
Maintaining client engagement		
Handling questions effectively		
Addressing objections during presentation		
Presenting pricing confidently		
Closing with clear next steps		

Total Score: _____ / 50

Areas for Improvement:

1.
2.
3.

Part 2: Presentation Framework Practice

Using the 7-step consultative presentation framework, outline your next presentation:

Client/Prospect Name: ____________________________

Step 1: Recap Discovery Insights (What will you summarize?)

Investment Strategy:

Current Challenges:

Timeline & Goals:

Step 2: Recommended Solution (What are you recommending and why?)

Loan Product:

Why This Solution:

Key Features That Address Their Needs:

Step 3: What's In It For Them (Benefits and outcomes)

Benefit 1:

Benefit 2:

Benefit 3:

Step 4: Social Proof (Which case study/testimonial will you use?)

Step 5: Options (If presenting multiple options)

Option 1:

Option 2:

Your Recommendation:

Step 6: Confirm Understanding (Questions you'll ask)

1.
2.

Step 7: Next Steps (What will you propose?)

Part 3: Customization Planning

For Your Next 3 Presentations:

Presentation 1:

Client Name: ______________________________

Their DISC Personality: D / I / S / C (circle one)

How I'll Adapt My Presentation Style:

Specific Pain Points to Address:

Relevant Case Study to Share:

Visual Aids I'll Prepare:

Presentation 2:

Client Name: ____________________________

Their DISC Personality: D / I / S / C (circle one)

How I'll Adapt My Presentation Style:

Specific Pain Points to Address:

Relevant Case Study to Share:

Visual Aids I'll Prepare:

Presentation 3:

Client Name: ____________________________

Their DISC Personality: D / I / S / C (circle one)

How I'll Adapt My Presentation Style:

Specific Pain Points to Address:

Relevant Case Study to Share:

Visual Aids I'll Prepare:

Part 4: Presentation Mistakes Audit

Review your last 3 presentations. Did you make any of these mistakes?

Mistake	Yes/No	How to Improve
Feature dumping (not connecting to needs)		
Talking too much (not enough dialogue)		
Presenting too many options		
Ignoring discovery insights		
Focusing on price too early		
Not handling objections		
Weak close (no clear next step)		

Biggest Presentation Mistake I Need to Fix:

Action Plan to Fix It:

Part 5: Loan Product Presentation Scripts

For each loan product, write your key talking points:

DSCR Loans:

Key Benefits:

Who It' s For:

Presentation Hook:

Fix & Flip Loans:

Key Benefits:

Who It’ s For:

Presentation Hook:

Bridge Loans:

Key Benefits:

Who It’ s For:

Presentation Hook:

Portfolio Loans:

Key Benefits:

Who It’ s For:

Presentation Hook:

Part 6: Pricing Presentation Practice

Develop your pricing presentation framework:

How I’ ll Introduce Pricing (After establishing value):

How I’ ll Break Down Costs Transparently:

How I’ ll Handle “That’ s Expensive” Objection:

How I’ll Position Our Premium Pricing:

Part 7: Visual Aids Inventory

List the visual aids you currently have:

- [ ] Rate sheets for each loan product
- [ ] Loan comparison charts
- [ ] Process timeline diagram
- [ ] Case study documents
- [ ] Client testimonials
- [ ] Cost breakdown templates
- [ ] ROI calculators
- [ ] Other: ______________________________

Visual Aids I Need to Create:

1.
2.
3.

Part 8: Virtual Presentation Checklist

For your next virtual presentation, complete this checklist:

Before the Call:

- [ ] Test screen sharing capability
- [ ] Test audio and video quality
- [ ] Prepare and organize digital materials
- [ ] Send agenda and materials in advance
- [ ] Eliminate background distractions

- [ ] Have backup plan for tech issues

During the Call:

- [ ] Start with tech check ("Can you see/hear me?")
- [ ] Share screen with clean, organized desktop
- [ ] Check in frequently ("Can you see this clearly?")
- [ ] Use engaging visuals
- [ ] Maintain eye contact with camera
- [ ] Record session (with permission)

After the Call:

- [ ] Send recording link
- [ ] Send summary and materials
- [ ] Follow up on action items

Part 9: Case Study Development

Create 3 case studies you can use in presentations:

Case Study 1:

Client Type: ____________________________

Their Challenge:

Solution You Provided:

Results They Achieved:

Quote/Testimonial:

Case Study 2:

Client Type: ______________________________

Their Challenge:

Solution You Provided:

Results They Achieved:

Quote/Testimonial:

Case Study 3:

Client Type: ______________________________

Their Challenge:

Solution You Provided:

Results They Achieved:

Quote/Testimonial:

Part 10: 30-Day Presentation Improvement Plan

Week 1: Preparation & Framework

- [ ] Review all discovery notes before presentations
- [ ] Outline each presentation using 7-step framework
- [ ] Prepare customized visual aids
- [ ] Practice presentations out loud

Week 2: Delivery & Engagement

- [ ] Record 2-3 presentations for self-review
- [ ] Focus on storytelling techniques
- [ ] Increase client engagement (more questions)
- [ ] Get feedback from manager/colleague

Week 3: Customization & Adaptation

- [ ] Identify DISC personality for each prospect
- [ ] Adapt presentation style accordingly
- [ ] Use relevant case studies
- [ ] Personalize every presentation

Week 4: Refinement & Optimization

- [ ] Analyze which presentations led to closes
- [ ] Identify patterns in successful presentations
- [ ] Refine presentation framework
- [ ] Update visual aids and case studies

Part 11: Presentation Performance Tracking

Track your presentation metrics:

Date	Client Name	Loan Product	Presentation Length	Next Step Agreed?	Result
				Yes / No	
				Yes / No	
				Yes / No	
				Yes / No	
				Yes / No	

Presentation → Application Rate: _____ %

Presentation → Close Rate: _____ %

Average Time from Presentation to Decision: _____ days

Part 12: Reflection & Commitment

After completing this module, answer these questions:

What is my biggest takeaway from this module?

What presentation skill will I focus on improving first?

What specific action will I take this week to improve my presentations?

How will I measure my presentation improvement?

My commitment to presentation excellence:

I commit to preparing thoroughly for every presentation, customizing my approach to each client, and always ending with a clear next step. I will track my presentation metrics and continuously improve my effectiveness.

Signature: _____________________________ **Date:** ___________

Complete this worksheet thoroughly and refer back to it regularly. Effective presentations are the bridge between discovery and closing—master this skill and you' ll dramatically increase your close rate.