Prepared for Jordan Avery, Branch manager, Sample Mortgage. Confidential.
Illustrative numbers. This is what every edition will analyze once the Park has the data.

Jordan, 147 LOs looked at your storefront in Q3 2026 (Jul to Sep) and 6 booked a meeting with you. Views rose 28% on the quarter before.

Storefront views	Shortlists	Conversations	Meetings booked
213	42	18	6
before: 166	before: 33	before: 14	before: 5






1 Decisions for this quarter

1 From a conversation to a meeting

You had 6 meetings for 18 conversations this quarter, a rate of 33% (36% the quarter before). The middle leader among your peers is at 39%.

Recommendation

You are below the middle of your peers at this step. Look at what your storefront shows at this point (the pitch, the pay, the support) and fill the gaps this report names.

Expected lift: About 1 more meeting at your current traffic

2 From a view to a shortlist

You had 42 shortlists for 213 storefront views this quarter, a rate of 20% (20% the quarter before). The middle leader among your peers is at 23%.

Recommendation

You are below the middle of your peers at this step. Look at what your storefront shows at this point (the pitch, the pay, the support) and fill the gaps this report names.

Expected lift: About 7 more shortlists at your current traffic

3 W-2 basis points by range

What brokers with 11 to 50 LOs (5 shops) publish for the ranges you recruit, beside your best plan for each range.

Recommendation

Your bps for the $20–40M range sits in the bottom quarter of your peers. The middle is 140 bps; decide whether to move, or to make the rest of your offer carry the difference.

Expected lift: No estimate yet

2 Where you stand

Your Draw by range



In Draw, Park median 50.

How strongly your storefront draws each range you recruit this quarter, against every shop those LOs visited. It weighs four things equally: your share of the range's visitors, and how many of yours shortlisted, wrote and booked. 50 is the Park median.

$20–40M 25% shortlisted against 22% at the median shop, 17 shops	75
$40–60M 29% shortlisted against 22% at the median shop, 17 shops	88
$60–100M 8% shortlisted against 19% at the median shop, 17 shops	3

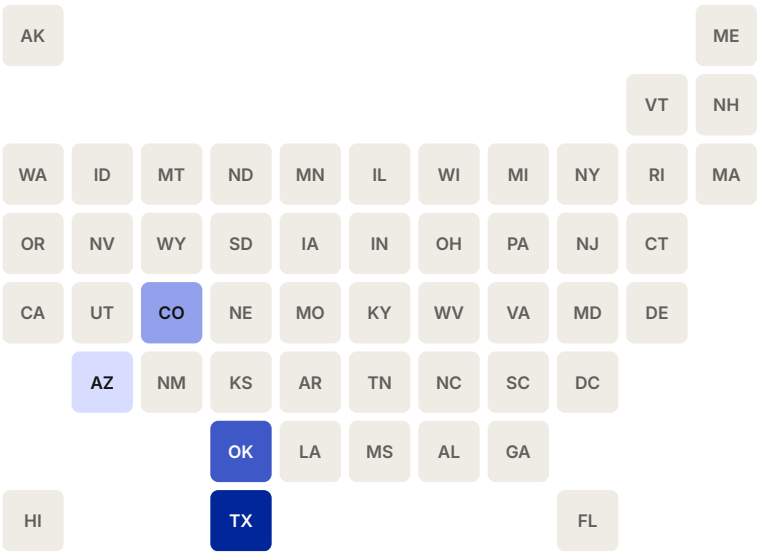
Recommendation

$60–100M producers open your storefront but rarely shortlist it. Lead with what they ask for most, shown under What LOs in your ranges want.

Expected lift: No estimate yet

Where the LOs you recruit are licensed

Information



Darker means more LOs.

Fewer More

Plus 2 in states with fewer than five, shown together.

Active, verified LOs in the ranges you recruit, by the state they are licensed in. Someone licensed in two states counts in both. The map shows the $20–40M range.

$20–40M 65 licenses in all	**Texas 30, Oklahoma 16, Colorado 12**
$40–60M 54 licenses in all	**Texas 30, Colorado 11, Oklahoma 9**
$60–100M 46 licenses in all	**Texas 25, Oklahoma 12, Arizona 6**
$100M+ 46 licenses in all	**Texas 27, Oklahoma 13, Colorado 6**

How soon they want to move

Information



In LOs.

Of 220 LOs in the ranges you recruit, 26% want to move in the next three months.

LOs per recruiting shop in your states

Information

For each range you recruit: the LOs licensed in your states, divided by the shops recruiting that range there. A shop licensed in two of your states counts twice. A higher number means more people for each shop competing for them.

$20–40M 58 licenses, 12 shop and state pairs recruiting	**4.8 per shop**
$40–60M 50 licenses, 9 shop and state pairs recruiting	**5.6 per shop**
$60–100M 40 licenses, 9 shop and state pairs recruiting	**4.4 per shop**
$100M+ 46 licenses, 6 shop and state pairs recruiting	**7.7 per shop**

How often your company shows in Search

Information

Sample Mortgage appeared on 159 search result pages this quarter; the middle shop of brokers with 11 to 50 LOs (5 shops) appeared on 195. A search lists the company, so this number is the same for every leader there.

Sample Mortgage	**159**
Middle of your peers Brokers with 11 to 50 LOs (5 shops)	**195**
Your percentile	**20**

3 What the shops LOs choose have in common

A big scenario your storefront does not cover

23 LOs in your states star "Construction to permanent", and it is marked not supported.

Scenario
23 star it

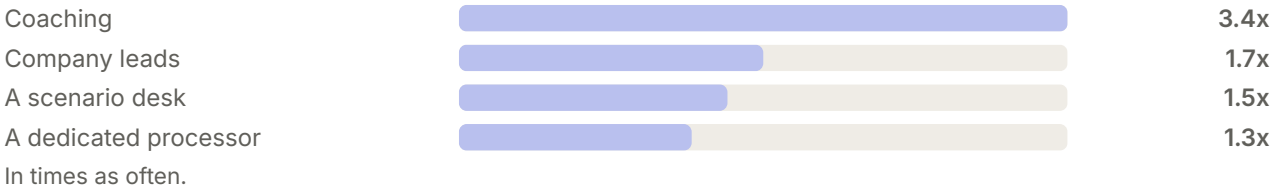
Construction to permanent

Recommendation

If you can take "Construction to permanent" with conditions, say so in the scenario matrix. The LOs who star it filter on it.

Expected lift: No estimate yet

What the shops $20–40M producers shortlist most share



In times as often.

The top 5 of 17 shops by shortlist rate among $20–40M producers this quarter, beside every shop those producers visited. Shaded bars are facts your storefront does not show.

Coaching — **3.4x**
80% of the top shops, 24% of all, you do not show it

Company leads — **1.7x**
20% of the top shops, 12% of all, you do not show it

A scenario desk — **1.5x**
60% of the top shops, 41% of all, you do not show it

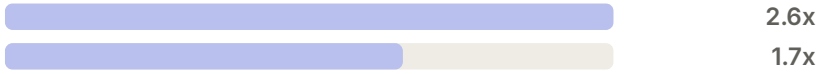
A dedicated processor **1.3x**
100% of the top shops, 76% of all, you do not show it

Recommendation

80% of the shops $20–40M producers shortlist most show coaching, against 24% of every shop they visited. Your storefront does not show it. Add it if you offer it.

Expected lift: No estimate yet

What the shops $20–40M producers book meetings with most share



In times as often.

The top 5 of 17 shops by meeting rate among $20–40M producers this quarter, beside every shop those producers visited. Shaded bars are facts your storefront does not show.

Coaching **2.6x**
60% of the top shops, 24% of all, you do not show it

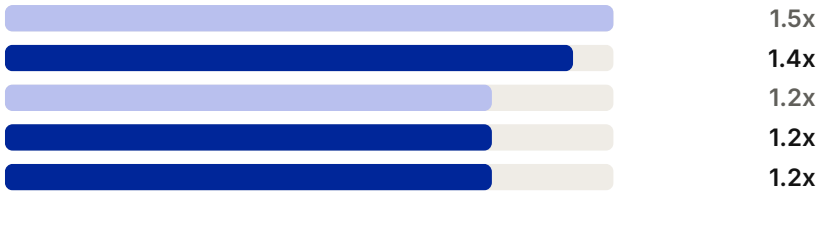
Company leads **1.7x**
20% of the top shops, 12% of all, you do not show it

Recommendation

60% of the shops $20–40M producers book meetings with most show coaching, against 24% of every shop they visited. Your storefront does not show it. Add it if you offer it.

Expected lift: No estimate yet

What $20–40M producers shortlist



In times as often.

Across 213 shortlists by $20–40M producers in the Park this quarter, these storefront facts show up more often than they do across all live shops.

A dedicated processor 94% of their shortlists, you do not show it	**1.5x**
No non-compete 60% of their shortlists, you show it	**1.4x**
Company leads 22% of their shortlists, you do not show it	**1.2x**
W-2 employment 100% of their shortlists, you show it	**1.2x**
Remote or hybrid work 22% of their shortlists, you show it	**1.2x**

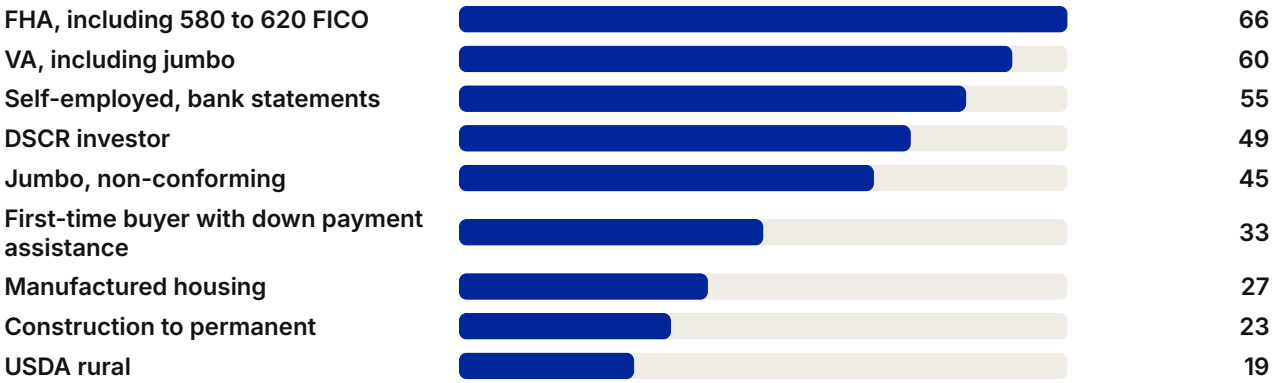
Recommendation

Shops with a dedicated processor are shortlisted 1.5x as often by this range as their share would predict, and your storefront does not show it. Add it if you offer it.

Expected lift: No estimate yet

The borrower scenarios big in your states

Information

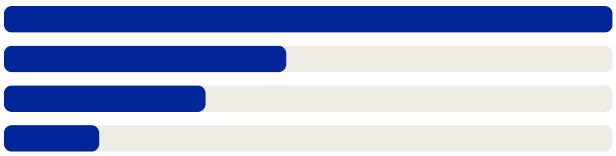


In LOs.

What LOs licensed in your states star in their own book. Someone licensed in two of your states counts in both.

What LOs filter on

Information



In searches.

38% of 1,860 searches in the Park this quarter used a filter.

4 What LOs in your ranges want

The goal your storefront does not answer yet

"Operations that close on time" is the first goal of 14 LOs in the $20–40M range, and your storefront shows neither a dedicated processor nor a scenario desk.

Goal
14 rank it first

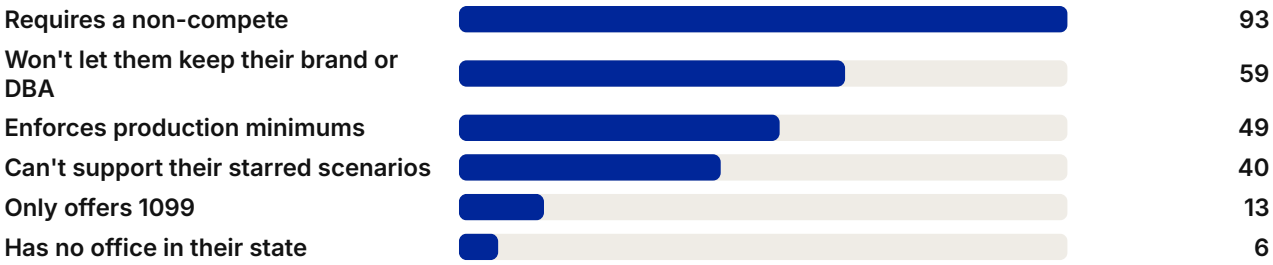
Operations that close on time

Recommendation

If you offer either, add it to your support section; if not, share your turn times in How files move here.

Expected lift: No estimate yet

What they would say no to



In LOs.

Each LO names up to three things that rule a shop out. Of the 220 LOs in the ranges you recruit, this many would say no to a shop that does each one.

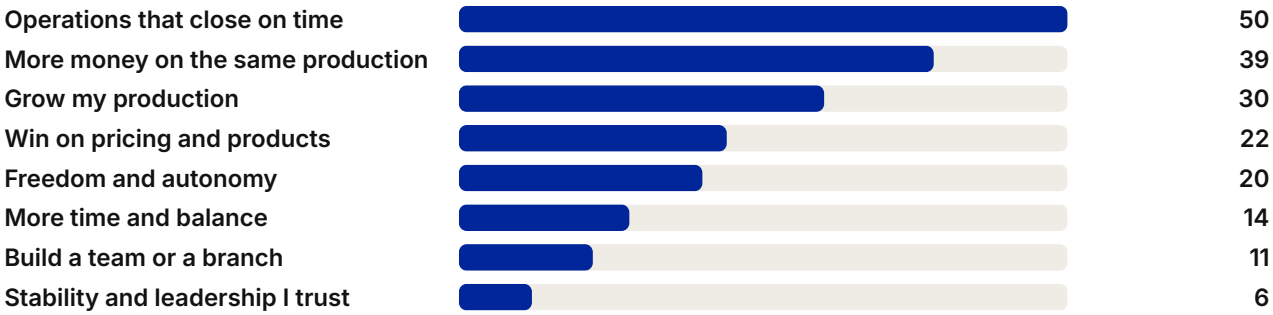
Recommendation

59 LOs in your ranges would say no to a shop that won't let them keep their brand or DBA, and your storefront shows exactly that. If it can change, update your storefront and they can see you again.

Expected lift: No estimate yet

What the LOs you recruit want most

Information

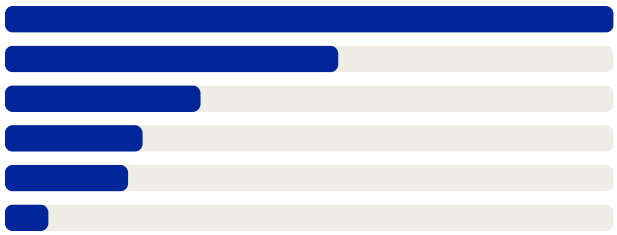


In LOs.

192 LOs in the ranges you recruit ranked their goals. "Operations that close on time" comes first for 26% of them.

The systems they work in today

Information



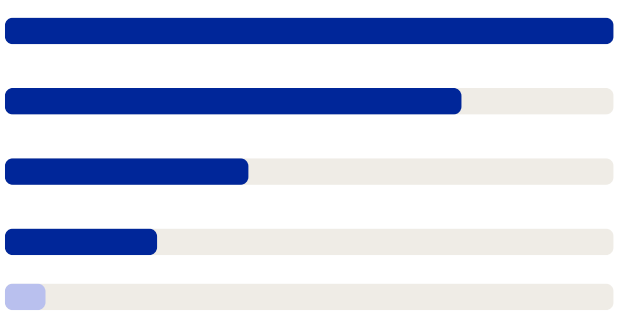
In LOs.

The loan and CRM systems the LOs in the ranges you recruit said they use. If yours is among them, say it on your storefront.

5 What changed

Who came, by production range

Information



In visits.

148 visits this quarter, by the visitor's production range. The note on each range compares its share of your visitors with its share of every active LO in the Park.

How LOs moved across the Park

Information

Across every shop this quarter: shortlists, conversations and meetings, and how many shortlists moved on to talking, met and decided.

Shortlists +18% against 540 the quarter before	**636**
Conversations +19% against 243 the quarter before	**288**
Meetings +29% against 72 the quarter before	**93**
Moved to talking +30% against 69 the quarter before	**90**
Moved to met +33% against 27 the quarter before	**36**
Moved to decided +100% against 6 the quarter before	**12**

Who opened your storefront

Information



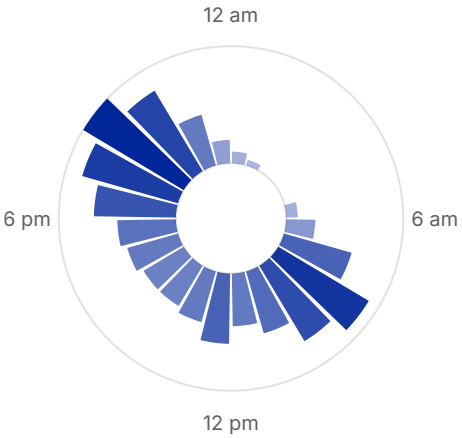
Jul 1, 2026 views Sep 30, 2026

LOs opened your storefront 213 times this quarter. Views rose 28% on the quarter before. 147 different people looked.

Storefront views +28% against 166 the quarter before	**213**
Different people +28% against 115 the quarter before	**147**
Shortlists +27% against 33 the quarter before	**42**
Conversations +29% against 14 the quarter before	**18**
Meetings booked +20% against 5 the quarter before	**6**

When LOs look at your storefront

Information



Busiest around 8 pm Eastern

Each wedge is one hour of the day; the longer it is, the more people looked then.

Most views land around 8 pm Eastern. A reply sent near the busy hours meets people while they are still deciding.

8 pm of your views	**9%**
8 am of your views	**9%**
7 pm of your views	**8%**

6 Your funnel beside peers

From a conversation to a meeting

You had 6 meetings for 18 conversations this quarter, a rate of 33% (36% the quarter before). The middle leader among your peers is at 39%.

This quarter 6 of 18	**33%**
The quarter before	**36%**
Middle of your peers Leaders at brokers with 11 to 50 LOs (10 leaders)	**39%**
Your percentile	**40**

Recommendation

You are below the middle of your peers at this step. Look at what your storefront shows at this point (the pitch, the pay, the support) and fill the gaps this report names.

Expected lift: About 1 more meeting at your current traffic

From a view to a shortlist

You had 42 shortlists for 213 storefront views this quarter, a rate of 20% (20% the quarter before). The middle leader among your peers is at 23%.

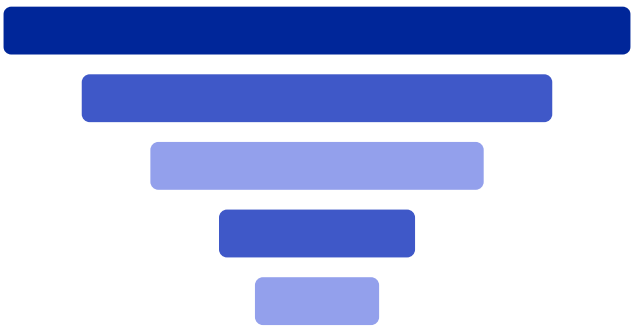
This quarter 42 of 213	**20%**
The quarter before	**20%**
Middle of your peers Leaders at brokers with 11 to 50 LOs (10 leaders)	**23%**
Your percentile	**10**

Recommendation

You are below the middle of your peers at this step. Look at what your storefront shows at this point (the pitch, the pay, the support) and fill the gaps this report names.

Expected lift: About 7 more shortlists at your current traffic

How far they watched your pitch



96 LOs pressed play this quarter. 53% reached the half and 20% the end.

Plays	**96**
Reached the half	**53%**
Reached the end	**20%**

Recommendation

Fewer than a quarter of viewers reach the end. Cut the pitch to the first ninety days and the one fact that makes you different; two minutes is enough.

Expected lift: No estimate yet

Messages in and your replies

LOs sent you 66 messages this quarter and you sent 48: 0.7 replies for each message.

From LOs	**66**
From you	**48**

Recommendation

Fewer than one reply for each message. Answer every first message within a day; your inbox marks the conversations waiting on you.

Expected lift: No estimate yet

From a shortlist to a conversation

Information

You had 18 conversations for 42 shortlists this quarter, a rate of 43% (42% the quarter before). The middle leader among your peers is at 37%.

This quarter 18 of 42	**43%**
The quarter before	**42%**
Middle of your peers Leaders at brokers with 11 to 50 LOs (10 leaders)	**37%**
Your percentile	**60**

From a card seen to a meeting

Information

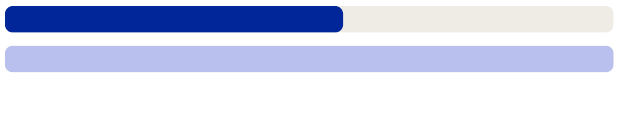


Each step of your funnel this quarter, with the middle of leaders at brokers with 11 to 50 LOs (10 leaders) beside it.

Opened your card of the step before, middle of your peers 29%	**31%**
Opened your storefront of the step before, middle of your peers 58%	**55%**
Shortlisted you of the step before, middle of your peers 23%	**20%**
Started a conversation of the step before, middle of your peers 37%	**43%**
Booked a meeting of the step before, middle of your peers 39%	**33%**

Why they booked a meeting with you

Information



14 answers from LOs who booked a meeting with you this quarter. Each could pick up to three.

What your conversations opened with

Information



18 LOs started a conversation with you this quarter. The first topic they picked:

7 Your offer beside others

W-2 basis points by range

What brokers with 11 to 50 LOs (5 shops) publish for the ranges you recruit, beside your best plan for each range.

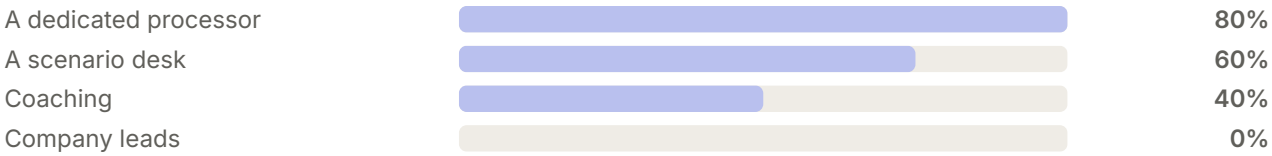
$20–40M middle 140, middle half 131 to 142 (5 shops)	**You 110 bps**
$40–60M middle 146, middle half 144 to 149 (5 shops)	**You 110 bps**
$60–100M middle 153, middle half 152 to 153 (5 shops)	**You 125 bps**
$100M+ middle 159, middle half 158 to 163 (5 shops)	**You 125 bps**

Recommendation

Your bps for the $20–40M range sits in the bottom quarter of your peers. The middle is 140 bps; decide whether to move, or to make the rest of your offer carry the difference.

Expected lift: No estimate yet

The support your peers offer



In percent of peers.

How many of brokers with 11 to 50 LOs (5 shops) show each kind of support, beside yours.

A dedicated processor you do not show it	**80%**
A scenario desk you do not show it	**60%**
Coaching you do not show it	**40%**
Company leads you do not show it	**0%**

Recommendation

80% of your peers show a dedicated processor and you do not. If you offer it, add it to your support section; if not, it is the gap LOs will compare.

Expected lift: No estimate yet

How your peers employ and where they work

Information

How many of brokers with 11 to 50 LOs (5 shops) offer each, beside you.

W-2 offered you do	**100%**
1099 offered you do not	**40%**
Remote or hybrid you do	**60%**

8 Your team

Each leader's counts for this quarter. Their conversations stay theirs.

Leader	Views	Different people	Shortlists	Conversations	Meetings
Jordan Avery (you)	213	147	42	18	6
Sam Rivera	136	94	27	12	4
Priya Shah Paused	45	31	9	4	1

9 More to try (10)

Your Draw by range

$60–100M producers open your storefront but rarely shortlist it. Lead with what they ask for most, shown under What LOs in your ranges want. Expected lift: No estimate yet

The goal your storefront does not answer yet

If you offer either, add it to your support section; if not, share your turn times in How files move here. Expected lift: No estimate yet

A big scenario your storefront does not cover

If you can take "Construction to permanent" with conditions, say so in the scenario matrix. The LOs who star it filter on it. Expected lift: No estimate yet

What the shops $20–40M producers shortlist most share

80% of the shops $20–40M producers shortlist most show coaching, against 24% of every shop they visited. Your storefront does not show it. Add it if you offer it. Expected lift: No estimate yet

What the shops $20–40M producers book meetings with most share

60% of the shops $20–40M producers book meetings with most show coaching, against 24% of every shop they visited. Your storefront does not show it. Add it if you offer it. Expected lift: No estimate yet

What $20–40M producers shortlist

Shops with a dedicated processor are shortlisted 1.5x as often by this range as their share would predict, and your storefront does not show it. Add it if you offer it. Expected lift: No estimate yet

What they would say no to

59 LOs in your ranges would say no to a shop that won't let them keep their brand or DBA, and your storefront shows exactly that. If it can change, update your storefront and they can see you again. Expected lift: No estimate yet

How far they watched your pitch

Fewer than a quarter of viewers reach the end. Cut the pitch to the first ninety days and the one fact that makes you different; two minutes is enough. Expected lift: No estimate yet

The support your peers offer

80% of your peers show a dedicated processor and you do not. If you offer it, add it to your support section; if not, it is the gap LOs will compare. Expected lift: No estimate yet

Messages in and your replies

Fewer than one reply for each message. Answer every first message within a day; your inbox marks the conversations waiting on you. Expected lift: No estimate yet

Who you are compared with

Your funnel: Leaders at brokers with 11 to 50 LOs (10 leaders) (10)

Your offer and search: Brokers with 11 to 50 LOs (5 shops) (5)

How this report is built

Periods are calendar days in Eastern time. Your numbers come from your own storefront, conversations and meetings, added up for the period; search appearances count your whole company, since a search lists the company. Groups of fewer than five people are shown together so nobody can be picked out. Peers are leaders and companies like yours and never include your own company. A report never changes once it is generated. This one was generated on Oct 1, 2026.