Admin Onboarding: Automating Workflows

Automate It!

Use the following outcome examples to drive follow-up automation:

- Follow Up in # Days
  - Use this type of outcome as a journey trigger, then assign tasks to remind the end user to follow up.
  - For example: *Follow up in 3 days.* When an LO selects this outcome, onboard the contact to a quick journey and assign a task to the contact, which will be due in 3 days, then remove the contact from the journey.
- Sent Application/Information
  - Use this outcome to automatically send out emails with information that loan officers' contacts and borrowers may request, like FAQ on loan processes and information on different programs.
  - For example: *Sent HELOC program information.* When an LO selects this outcome, onboard the contact to a journey that will send out the specific marketing email(s) with information on a HELOC.
- Add to [ABC] Campaign
  - Use this type of outcome to add contacts and leads to informational campaigns, based on their interest.
  - Use this outcome as a journey trigger to add the contact to the appropriate informational campaign.
  - Use this type of outcome to group contacts, then use the group to send out email campaigns using the campaign builder.

Lead capture applications:

- Use the **Landing Page Layout** inline condition to onboard contacts from those types of lead capture apps to custom journeys, which support their specific needs.

Set loan officer default notifications to ALL ON.

- Use the bulk user edit feature to turn on high-priority, automated notifications that alert the loan officer when things happen in the system, such as:
  - new co-marketing partner listings
  - the Daily Digest email
  - task assignment

TOTAL EXPERT

Where to Go for More

- Attend live *The Expert Academy: Journey Testing* session
- Attend live *The Expert Academy – Build With Me: Focused View* session
- *Journey Manual*: https://totalexpert.freshdesk.com/support/solutions/articles/22000278957-journey-manual
- *Journey Publishing Settings*: https://totalexpert.freshdesk.com/support/solutions/articles/22000279558-journey-publishing-settings
- *Journey Best Practices*: https://totalexpert.freshdesk.com/support/solutions/articles/22000279561-journey-best-practices
- *Focused View for Administrators*: https://totalexpert.freshdesk.com/support/solutions/articles/22000279624-focused-view-for-administrators