Rate Alert Insight Journey

The Rate alert notifies end users when one of their customers could benefit from a refinance based off their *original* loan rate and the *current* market rates. The Expert Content journey that supports this alert serves up reminders via tasks and notifications for the end user to ensure timely follow-up on these high-value leads.

Available Journey Options

- CI: Rate Alert Insight Journey (General)

How do you get the Customer Intelligence journeys ready?

- Review the journey's name and description.
- Review the Insight Trigger.
  - Determine whether there are any additional inline conditions needed to on-ramp your organization's contacts.
- Define a success path (the "off ramp").
  - Set the loan status to the first step when the contact applies or pre-qualifies.
- Define any adverse paths (the "off ramps").
  - Email unsubscribe is included by default in this journey.
- Review all Expert Content email templates and update to match your organization's guidelines, if necessary.
  - Add folders and/or tags for each Customer Intelligence email.
  - Add URL links to buttons at the bottom of each email.
  - Verify email placeholder variables will work for your organization.
- Review all content and update to match your organization guidelines, if necessary.
  - Task snippets
  - Task outcomes
  - SMS snippets
- Review timer delays.
  - Timer delays are used to send communications to the prospect at the appropriate cadence. Your organization may want to accelerate or extend the timeline by adjusting the timer delays.
- Review the tasks that are defined throughout the journey.
  - The prospects in this journey are onboarded by an insight—indicating that they are high-value. Tasks are included in the journey to ensure that the end user is active in following up with them.
  - End users will see the available task outcomes when they mark a task complete. Update the task outcomes to your preferred copy.
- Update journey statuses to reflect what you would like to see in reporting.
  - The default journey status names follow the formula `name of the journey + loan status`.
  - Journey statuses are used to see how many contacts have made it through each phase of the journey.

TOTAL EXPERT