

Five Days of Focused View

Sometimes less is more. Sometimes having too many Focused Views can be overwhelming for the end user and they may not know where to start.

One of our best practices for driving end user adoption of Focused View is to create a weekly strategy. Consider choosing five of your most impactful views and designating a day of the week for each view. This way, the end user knows exactly which view to work through each day of the week.

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Example Framework

Below is an example of what a weekly Focused View strategy could look like.

Monday - New Leads

Reach out to all of your new leads.

Tuesday - Pre-Approvals

• Touch base with all of your clients who have been pre-approved and are waiting to take their next step in the loan process.

Wednesday - Loan Status Update

Provide a quick loan status update on all your active loans to each loan participant.

Thursday - Expiring Pre-Approvals

Reach out to borrowers whose pre-approval period will expire soon

Friday - Refinance Opportunities

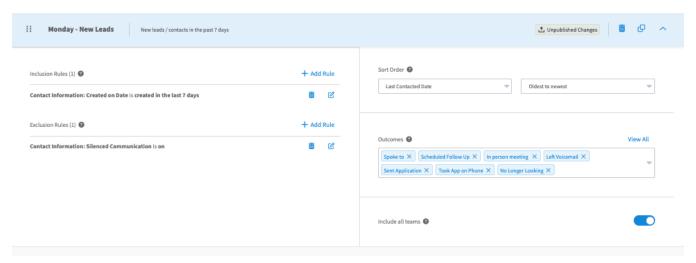
Reach out to all of your potential refinance opportunities.

Administrator Notes

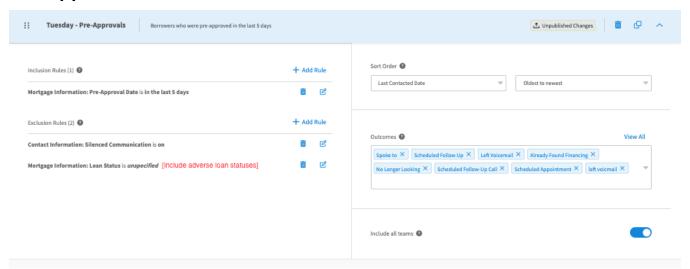
Below are ideas on how you can set up the above Focused Views.



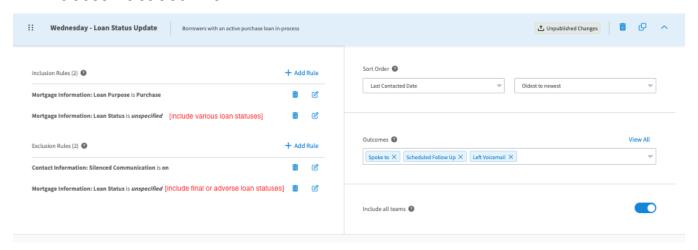
New Contacts Focused View



Pre-Approval Focused View

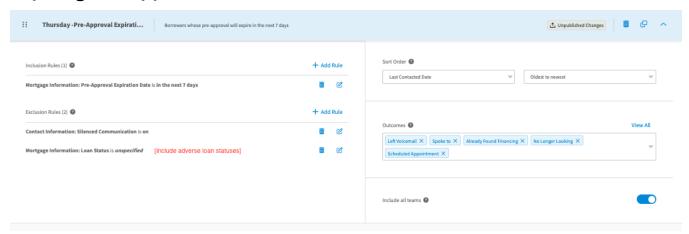


In-Process Focused View





Expiring Pre-Approvals Focused View



Refinance Focused View

