



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

Monday - New Leads | New leads / contacts in the past 7 days

Unpublished Changes

Inclusion Rules (1) [+ Add Rule](#)

Contact Information: Created on Date is created in the last 7 days

Exclusion Rules (1) [+ Add Rule](#)

Contact Information: Silenced Communication is on

Sort Order

Last Contacted Date | Oldest to newest

Outcomes [View All](#)

Spoke to X Scheduled Follow Up X In person meeting X Left Voicemail X
Sent Application X Took App on Phone X No Longer Looking X

Include all teams

Pre-Approval Focused View

Tuesday - Pre-Approvals | Borrowers who were pre-approved in the last 5 days

Unpublished Changes

Inclusion Rules (1) [+ Add Rule](#)

Mortgage Information: Pre-Approval Date is in the last 5 days

Exclusion Rules (2) [+ Add Rule](#)

Contact Information: Silenced Communication is on

Mortgage Information: Loan Status is *unspecified* [Include adverse loan statuses]

Sort Order

Last Contacted Date | Oldest to newest

Outcomes [View All](#)

Spoke to X Scheduled Follow Up X Left Voicemail X Already Found Financing X
No Longer Looking X Scheduled Follow Up Call X Scheduled Appointment X left voicemail X

Include all teams

In-Process Focused View

Wednesday - Loan Status Update | Borrowers with an active purchase loan in-process

Unpublished Changes

Inclusion Rules (2) [+ Add Rule](#)

Mortgage Information: Loan Purpose is Purchase

Mortgage Information: Loan Status is *unspecified* [Include various loan statuses]

Exclusion Rules (2) [+ Add Rule](#)

Contact Information: Silenced Communication is on

Mortgage Information: Loan Status is *unspecified* [Include final or adverse loan statuses]

Sort Order

Last Contacted Date | Oldest to newest

Outcomes [View All](#)

Spoke to X Scheduled Follow Up X Left Voicemail X

Include all teams



Expiring Pre-Approvals Focused View

Thursday - Pre-Approval Expirati... Borrowers whose pre-approval will expire in the next 7 days

Unpublished Changes

Inclusion Rules (1) [+ Add Rule](#)

Mortgage Information: Pre-Approval Expiration Date is in the next 7 days

Exclusion Rules (2) [+ Add Rule](#)

Contact Information: Silenced Communication is on

Mortgage Information: Loan Status is *unspecified* [Include adverse loan statuses]

Sort Order

Last Contacted Date Oldest to newest

Outcomes [View All](#)

Left Voicemail X Spoke to X Already Found Financing X No Longer Looking X

Scheduled Appointment X

Include all teams

Refinance Focused View

Friday - Refi Opportunities Potential refinance opportunities

Unpublished Changes

Inclusion Rules (3) [+ Add Rule](#)

Mortgage Information: Loan Purpose is Purchase

Mortgage Information: Interest Rate is greater than or equal to 7.000% [Customize interest rate based on market conditions]

Mortgage Information: Loan Status is FUNDED

Exclusion Rules (2) [+ Add Rule](#)

Contact Information: Silenced Communication is on

Mortgage Information: Funded Date is in the last 6 months

Sort Order

Last Contacted Date Oldest to newest

Outcomes [View All](#)

Left Voicemail X Scheduled Appointment X Scheduled Follow-Up Call X Spoke to X Not Interested X

Include all teams