LOA Best Practices Marketing Administrator Instructions

- For each loan officer assistant, ensure they are on a team with the loan officers they will be supporting.
- Within the team, turn on the manager toggle for the loan officer assistant so they can access the loan officer(s) account.
- If any of these tools are unavailable to your Total Expert instance, please reach out to your Customer Success Manager.

Best Practice 1: Pre-Approval / Pre-Approval Expiration Focused Views

- Create a Pre-Approval Focused View and a Pre-Approval Expiration Focused View, if you have not already.
- Enable for loan officers.

Best Practice 2: Daily Digest

- Turn on the Daily Digest for all loan officers, if you wish.
- Set up a mailbox rule so that Daily Digest emails are forwarded to loan officer assistants.

Best Practice 4: Weekly Loan Status Update Calls

- Set-up an In-Process Loans Focused View.
- Consider the following criteria:
  - Inclusion rule(s)
    - Loan purpose = purchase
    - Created date = last 90 days OR loan status = [various loan statuses]
  - Exclusion rule
    - Loan status = [final or adverse loan statuses]

Best Practice 5: Social Media

- Create at least 1 new piece of social media content per week.
- Email loan officers and loan officer assistants when new content is uploaded into Total Expert or email on a weekly basis.

Best Practice 6: Co-Marketing Kit

- Ensure print assets are enabled for loan officers