



Loan Officer Assistant Best Practices

Top Six Best Practices For LOA's Leveraging Total Expert

Best Practice #1: Monitor Pre-Approval / Pre-Approval Expiration Focused Views in Your Loan Officer's Account

The Pre-Approval Focused View surfaces any contact in your loan officer's database that has been pre-approved for a mortgage. The Pre-Approval Expiration Focused View surfaces any contact in your loan officer's database whose pre-approval will expire in [x] days. It is our recommendation that you log in each day and monitor these Focused Views.

Step 1: Go into your loan officer's account daily and view the Pre-Approval Focused View / Pre-Approval Expiration Focused View.

Step 2: Work down the list of contacts, calling each contact who has been pre-approved or has a pre-approval that is about to expire using our suggested messaging.

Step 3: Mark an outcome from the call, keep detailed notes in the contact record, and assign a follow-up task .

Example Call Script:

Pre-Approval: "Hi [contact first name], my name is [your first name], reaching out on behalf of [loan officer first name] at {mortgage company name}. It looks like you have been able to get you pre-approved on [insert loan details]. Do you have any questions about the next step in the loan process that I can help answer for you?"

Pre-Approval Expiration: "Hi [contact first name], my name is [your first name], reaching out on behalf of [loan officer first name] at {mortgage company name}. It looks like your pre-approval is expiring soon and I wanted to reach out to see how the home search is going? Is there anything I can help you with?"

Best Practice #2: Turn ON the Daily Digest for Your Loan Officer

Step 1: Ensure Daily Digest is turned ON for the loan officer(s) you are supporting and send an email to said loan officer(s) explaining what the Daily Digest is and how they can best leverage it.

If the loan officer(s) you are supporting already have the Daily Digest turned on, but do not look at it, we recommend sending a similar message reminding them of the benefits of the email.

Helpful Resources:

- [ROI One Pager](#)
- [Best Practices on Daily Digest](#)



Example Email:

“Hi [loan officer first name],

Total Expert recently did a study and found that loan officers who subscribed to the Daily Digest and leveraged the data to take action **saw 4x more loans driven, which converted to 3.4% more loans closed when compared to those who aren’t subscribed.**

The Daily Digest is a daily email from Total Expert that gives you a snapshot of all the marketing content going out on your behalf, upcoming tasks and reminders, client birthdays and loan anniversaries, new leads, and more! It allows you to quickly work through your list and prioritize calls and contacts accordingly.

If you would like me to, I can go ahead and turn on the Daily Digest so that you start receiving these emails immediately.”

Best Practice #3: Send Co-Marketing Invitations on Behalf of Your Loan Officer

Step 1: Email the buyer’s agent and seller’s agent on every recently funded loan using the email script below.

Step 2: Send Co-marketing invitation via Total Expert if requested. Our best practices is to fill out as much information as you can for the agent before sending the invitation.

Help resources:

- [Invite co-marketing partners to Total Expert](#)
- [Video training](#)

Example Email to Agents:

“Hi [agent first name],

It was a pleasure working with you on our recent transaction at [address / transaction]. I hope we can work together again in the future.

One of the ways I like to partner with my agents is through our CRM and marketing tool, Total Expert. This tool allows us to grow our respective brands, while also collaborating together. It comes at no cost to you and would provide you access to the following tools:

- Lead Management / CRM
- Open house flyers and other print content
- Single Property Websites
- Lead Capture Apps
- And more!

If you are interested in leveraging Total Expert, I can send you a Co-marketing invitation. Let me know!



Best Practice #4: Weekly Loan Status Update Calls

One of the best ways to create and retain more business is by creating clear and consistent lines of communication with everyone involved in the loan process. We recommend time blocking 1-2 hours one day a week to make loan update phone calls.

These phone calls should be short and sweet – under 3 minutes – giving each person associated with the loan a brief status update and letting them know that you are on track for a smooth and flawless closing.

Step 1: Go through each loan in process and call each person involved providing a status update.

- Both borrowers
- Both agents
- Title agent, escrow agent
- Insurance agent

Doing this every week will increase your pipeline by creating clear lines of communication, accountability, and trust.

Example Email Script:

“Hey there, it’s [your first name] with [insert company name here]. I just wanted to give you a quick update on your file. We have submitted the [file name] in to underwriting, have ordered the appraisal, and the due-back date is [xx/xx]. Everything is on track for a smooth and flawless closing.

Expect a call from me each week on [weekday] around the same time with a quick loan update. Do you have any questions for me?”

Best Practice #5: Schedule Social Media Posts for Your Loan Officer

Step 1: Ask your loan officer how many social media posts they want to go out each week or monthly (ex. 1 – 2 each week). Example email below.

Step 2: Set up a reoccurring task for the first Monday of every week (or the first Monday of every month) to schedule social media posts for your loan officer.

Step 3: Go into Total Expert and schedule social media posts for the week / month. Try to keep the day and time consistent.

Helpful Resources:

- [Guide to social media posting](#)
- [Posting content to social media](#)

Example Email to Loan Officer:

“Hey [loan officer first name],

Within Total Expert, we have a pre-built library of social media content that I can utilize and schedule for you in advance. Is this something you would like me to do for you on a weekly or monthly basis?



If so, what cadence do you prefer? And how many posts per week would you like me to do for you? I would recommend one per week to start and we can monitor performance from there.“

Best Practice #6: Create Marketing Kit for Agent Listings

Step 1: Reach out to your loan officer’s connected Co-marketing Partners about upcoming open houses.

Step 2: Create a marketing kit for each upcoming open house/new listing. This could include:

- Open House Lead Capture App
- Print Asset: rate flyer (if available), infographic (if available), property flyer, or just listed postcard (if available)
- Single Property Website

Step 3: Email the marketing kit to the agent.

Step 4: Create social media post announcing the new listing and post to social.

Need help getting started? Check out our [open house / new listing playbook](#).

Example email(s) to loan officers:

The ask: “Hi [agent first name], do you have any upcoming open houses/new listings that you want help promoting? If so, I’d be happy to pull together some marketing resources for you to promote the property. Let me know and I can send them right over!”

The response: “Hi [agent first name], here is the marketing kit for [insert property address].”

- Single Property Website (insert link)
- Open House Lead Capture App (insert link)
- Print flyer (attach to email)

I have also posted the property website to [loan officer first name] social media account (link to social post). Feel free to share the post or post the link yourself. Let me know if I can help you with anything else!”