Locked in on Lead Nurture Checklist

In our first onboarding training, loan officers focus on two key themes in Total Expert: **how do leads and contacts come into Total Expert** and **how do you communicate with them?** Use the checklist below to review low-, medium-, and high-effort actions you can take to ensure your new relationships get started on the right foot.

Good

- Create and manage your lead and contact relationships with Total Expert. This includes leaving notes, selecting outcomes, and assigning follow-up tasks.
- Review contact lists every day using Pipeline Views and contact lists published by your admins.
- Download the Total Expert mobile app on your smartphone.
- Nurture leads via automated journeys.

Better

- Create a Home Loan Lead Form Lead Capture App and post it to social media or share in public to generate purchase and refinance leads.
- Configure your own custom Pipeline Views and contact lists to surface meaningful opportunities.

Best

- Reach out to leads and contacts directly, in addition to leveraging all available automated communications. This includes:
  - Direct email messages
  - SMS
  - Phone calls
- Review email stats for outreach and support opportunities.