Creating Customers for Life Checklist

In our third and final onboarding training, loan officers focus on the themes of **providing exceptional experiences for in-process borrowers** and **staying visible to post-close customers.** Use the checklist below to review low-, medium-, and high-effort actions you can take to ensure you provide the experience and connection to create customers for life.

Good

- Turn the Daily Digest notification to **YES** to receive an email every morning with high-value information about your relationships and marketing efforts.
- Opt in to all available *In Process* and *Post Close* campaigns to take advantage of invaluable automation.
- Reach out directly to borrowers in high-need loan statuses in anticipation of their questions.
- Come to The Expert Academy for free monthly training. Visit totalexpert.com/expert-academy for more details.

Better

- Call borrowers on their home anniversary and birthdays as a part of regular post-close outreach.
- Leverage loan lists to identify high-value referral relationships.
- Provide immediate, direct outreach to customers with Customer Intelligence opportunities.

Best

- Schedule social media posts in advance, as new content becomes available to you.
- Create or customize Pipeline Views and contacts lists to meet your needs and preferences.
- Create and send high-value rate quotes for refinance opportunities.
- Review scheduled campaign and direct email content going out on your behalf.