



New Year's Resolutions for Total Expert Loan Officers

Use Pipeline Views to Identify Clients to Pursue

Tip

Build pipeline views to proactively reach out to clients who are currently in the loan process or may be ready to refinance.

- Custom pipeline view opportunities
 - Post-close pipeline view
 - 6 months post-closing
 - 1 year post-closing
 - Interest rate tiers, for example:
 - 6-6.5%
 - 6.5-7%
 - 7-7.5%
- Resources:
 - Pipeline view creation:
<https://totalexpert.freshdesk.com/support/solutions/articles/22000287681-leveraging-pipeline-views>

Monitor Co-Marketing Connection Effectiveness

Tip

Use saved loan lists to monitor the business that is tied to each co-marketing partner.

- Select **Loans** in the navigation menu to see your entire loan database.
- Use the filters to drill down by agent and timeframe to review how well your partners have been doing this year with your loan files.
 - Sort by **Buyer's Agent** and **Loan Creation Date**.
 - Save the list for future use.
- Resources:
 - How to save a new loan list:
<https://totalexpert.freshdesk.com/support/solutions/articles/22000281635-how-to-save-a-new-loan-list>

Build Your Personal Brand Online

Tip

Use different tools in Total Expert to expand your online brand exposure.



- Social media is a fantastic tool in Total Expert, and you can use it in a couple of ways:
 - Navigate to **Web Marketing → Social Media → Create New** to view the social media library in Total Expert and share any available assets to your networks.
 - Create a single property site and share it through your business account via Total Expert.
 - You can do this by copying the link for your single property site and navigating to **Web Marketing → Social Media → Scheduled / Posted**.
 - Click the **Create Post** button and paste the link in the **Share a link** field.
 - Add your message and schedule your post!
- Resources:
 - Single property sites: <https://totalexpert.freshdesk.com/support/solutions/articles/22000280104-single-property-website-quick-hit-video>
 - Social media posting in Total Expert: <https://totalexpert.freshdesk.com/support/solutions/articles/22000261171-social-media-posting-guide>