



# Rate Quotes for Loan Officers

## Use Pipeline Views to Identify Opportunities

### Tip

Think about pre-quoting opportunities and who will be an opportunity to reach out to based on the season, market, and potential need.

### Pipeline Views to Identify Opportunities Pre-Quote

- Pre-qualifications/approvals that are not locked
- Refinances for loan adjustments – FHA to Conventional or Jumbo to Conforming.
- Loan anniversary quotes for potential improvement
- Quoting based on customer intelligence insights

## Create Your Quote

### Tip

Based on the situation of your potential borrower, create a quote that will show potential options to accommodate their financial goals.

Use Total Expert's quoting functionality in each contact record to price out potential options for your borrowers.

- These quotes are based on your company's pricing integration to Total Expert.

You can create up to 3 custom quotes; create a variety based on the goals of your clients. Possible quote strategies:

- Different down payment options
- Loan product variety
- Same product but different rates and closing cost implications

## Promote Your Quote

### Tip

Use both pre-created email templates and post-quote pipeline views to stay in touch with the borrowers that you have sent unique quotes to.

There are email templates that your marketing administrator can use and adjust to give end users the chance to market the numbers. They will be named uniquely by the marketing administrator.

- These templates may have an approval flow. Reach out to the marketing administrator on their timing of approval.

Follow-up with your quoted individuals by using pipeline views and outcomes. Post-quote pipeline views can be created by using the Quote Created Date filter in the contact list, paired with or without specific outcomes and loan data.