

The Expert Academy Admin Onboarding Handout: Automating Workflows

Automate it!

Use the following outcome examples to drive follow-up automation:

- Follow Up in # Days
 - Use this type of outcome as a journey trigger, then assign tasks to remind the end user to follow up.
 - For example: *Follow up in 3 days*. When an LO selects this outcome, onboard the contact or lead to a quick journey and assign a task to the contact, which will be due in 3 days, then remove the contact from the journey.
- Send Application/Send Requested Information
 - Use this type of outcome to automatically send out emails with information that loan officers' contacts and borrowers may request, like an application, FAQ on loan processes, or information on different loan programs.
 - For example: *Send HELOC Program Information*. When an LO selects this outcome, onboard the contact or lead to a journey that will send out the specific marketing email(s) with information on a HELOC.
- Add to [ABC] Campaign
 - Use this type of outcome to add contacts and leads to informational campaigns, based on their interest.
 - Consider using groups in this type of campaign, then use the group to send out targeted email campaigns using Campaign Builder

Lead Capture Applications

- Use the **Landing Page Layout** inline condition to onboard contacts from those types of lead capture apps to custom journeys, which support their specific needs.

Loan Officer Notifications

- Set loan officer default notifications to **ALL ON**.
- Use the bulk user edit feature to turn on high-priority, automated notifications that alert the loan officer when things happen in the system, such as:
 - New co-marketing partner listings
 - The Daily Digest email
 - Task assignment