



Equity Alert Journey

The Equity alert notifies you when a contact has sufficient equity in their property to take advantage of HELOC, refinance, and other equity-driven product types. The estimated LTV is calculated based on the home's current valuation from Black Knight and your organization's specific qualifying variables. Using this journey will allow you to nurture the prospects generated via this Customer Intelligence alert. In addition, it serves up reminders via tasks and notifications for the end user to ensure timely follow-up on these high-value leads.

Available Journey Options

- CI: Equity Alert Insight (General)

How do you get the Customer Intelligence journeys ready?

- Review the journey's name and description.
- Review the Insight Trigger.
 - Determine whether there are any additional inline conditions needed to on-ramp your organization's contacts.
- Define a success path (the "off ramp").
 - Set the loan status to the first step when the contact applies or pre-qualifies.
- Define any adverse paths (the "off ramps").
 - Email unsubscribe is included by default in this journey.
- Review all Expert Content email templates and update to match your organization's guidelines, if necessary.
 - Add folders and/or tags for each Customer Intelligence email.
 - Add URL links to buttons at the bottom of each email.
 - Verify email placeholder variables will work for your organization.
- Review all content and update to match your organization guidelines, if necessary.
 - Task snippets
 - Task outcomes
 - SMS snippets
- Review timer delays.
 - Timer delays are used to send communications to the prospect at the appropriate cadence. Your organization may want to accelerate or extend the timeline by adjusting the timer delays.
- Review the tasks that are defined throughout the journey.
 - The prospects in this journey are onboarded by an insight—indicating that they are high-value. Tasks are included in the journey to ensure that the end user is active in following up with them.
 - Update the task outcomes to your preferred copy. End users will see these outcomes when they mark a task complete.
- Update journey statuses to reflect what you would like to see in reporting.
 - The default journey status names follow the formula `name of the journey + loan status`.
 - Journey statuses are used to see how many contacts have made it through each phase of the journey.