



Listing Insight Alert Journey

The Listing Insight alert notifies end users when there is new home listing that matches a contact's address on file. This will provide the user an opportunity to capture any new business that results in the listed home being sold.

Available Journey Options

- CI: Listing Insight Alert

How do you get the Customer Intelligence journeys ready?

- Review the content of each email template to ensure that the messages you send out align with your organization's messaging.
 - Preview the 3 different email templates included in this journey.
- Define a success path (the "off ramp").
 - The contact will leave the journey if they start a new loan or unsubscribe from future emails.
- Review the main task and outcomes.
 - If you want to keep the task, update the template it uses to notify the end user that their contact has listed their house for sale, that an email has been sent, that they should follow up, and that they should select a task outcome.
 - Define the task outcomes. By default, the options lead to separate paths based on whether:
 - the contact did not answer the phone call
 - the contact answered and is interested
 - the contact answered but is not interested
- 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.
- A listing insight only remains on the contact record for 7 days. Adjust the timing of the task's due date and the exit delay to track conversion accordingly.