Mortgage Credit Inquiry Alert Journey

The Mortgage Credit Inquiry alert notifies you when a contact applies or requests pre-approval for a mortgage at a competing lender or bank. 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: Mortgage Credit Inquiry Alert

How do you get the Customer Intelligence journeys ready?

- 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 the content of each email and SMS message to ensure that the content aligns with your organization's brand.
- Review the user notifications to ensure that the message aligns with your organization's desired message for the end user.
- 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.
  - End users will see the available task outcomes when they mark a task complete. Update the task outcomes to your preferred copy.
- 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.
- Review the journey's name and description.
- Update the journey statuses to your organization-specific statuses.