Lead Management Journey Playbook

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Purpose

This document provides a framework for applying lead management journey components to an existing journey wireframe. It includes recommended journey events for onramps, offramps, relevant event parameters, and inline conditions. The examples shown are intended for journeys running in loan officers' accounts and not in a holding account.
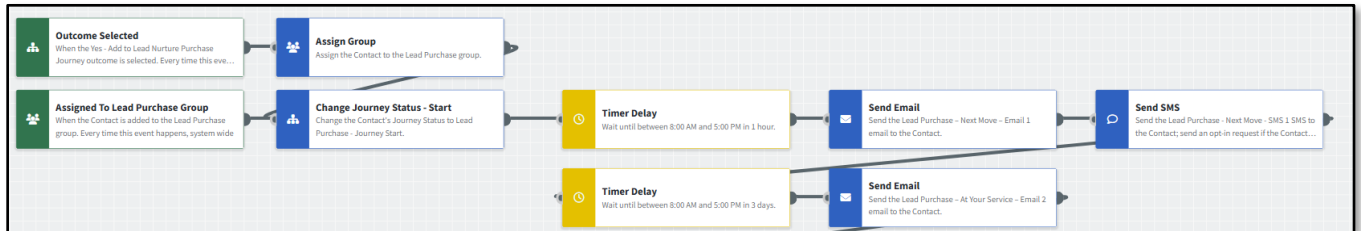
Lead Nurture Journeys (Lead Purchase Nurture example)

The following example can generally be applied to other lead nurture journeys, such as Refinance, Vacation/2nd Home, and more. Ensure that inline conditions and other event parameters correspond to each specific use case.
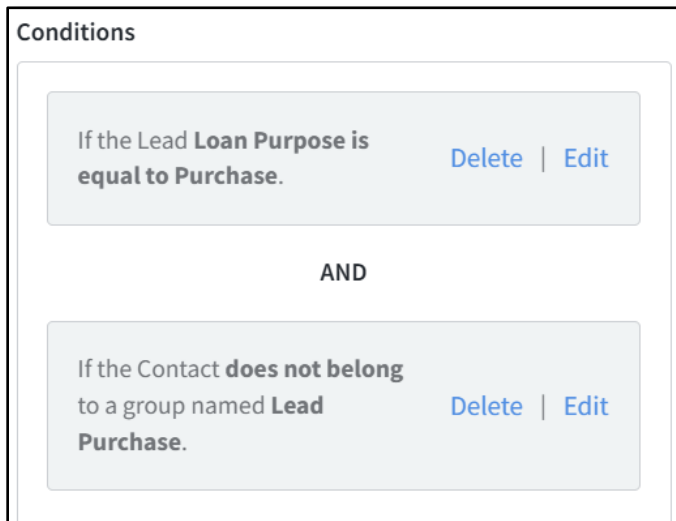
Onramps

Onramps Before

Steps to Update Onramps

1. Add new trigger: Lead Created
   a. Copy the Assigned To Group component and connect it to the Change Journey Status path.
   b. Inline conditions:
      i. Select **Lead Value** and set **Loan Purpose is equal to Purchase**.
      ii. Select **AND**.
      iii. Select **Contact Group** and set **Contact does not belong to a group named Lead Purchase**.

2. Add new action: Create Lead
   a. Add after exiting the Assigned To Group and/or Outcome Selected triggers.
   b. Event parameters:
      i. In the Loan Purpose field, select **Purchase**.
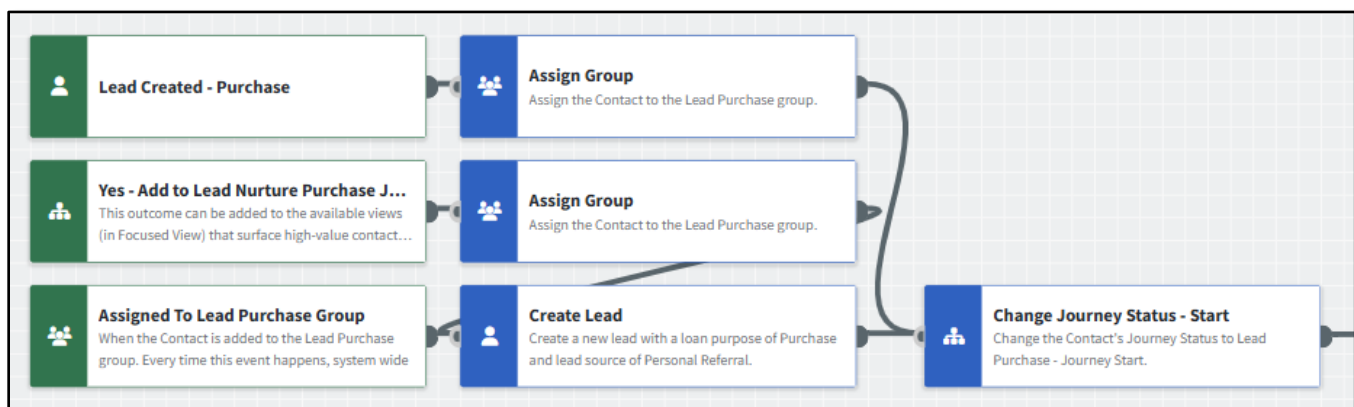   ii. Select a relevant option in the Lead Source field.

Onramps After

Offramps

Offramps Before
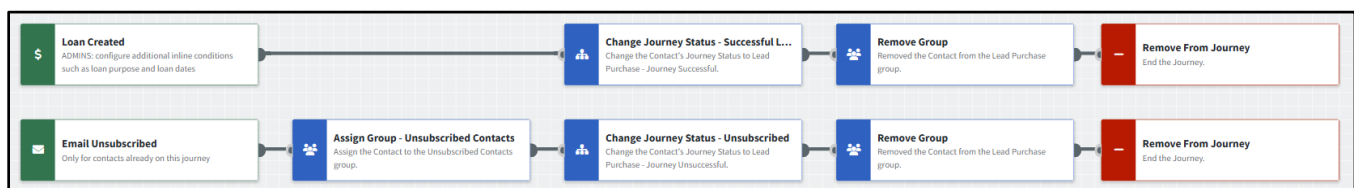
Steps to Update Offramps

1. Add new trigger(s): Lead Stage Change
   a. Add 2 separate triggers for successful and unsuccessful outcomes.
      i. For the successful path event parameters:
         1. In the When Should This Trigger Happen? field, select **Only for contacts already on this journey**.
         2. In the Lead Stage field, select **Application Submitted**, **Pre-Approved**, or **In Process**.

Event Parameters

When Should This Trigger Happen? *

Only for contacts already on this journey ▼

Lead Stage

Application Submitted ✕ Pre-Approved ✕

In Process ✕ ▼

ii. For the unsuccessful path, under event parameters:
1. In the When Should This Trigger Happen? field, select **Only for contacts already on this journey**.
2. In the Lead Stage field, select **Closed**.

Event Parameters

When Should This Trigger Happen? *
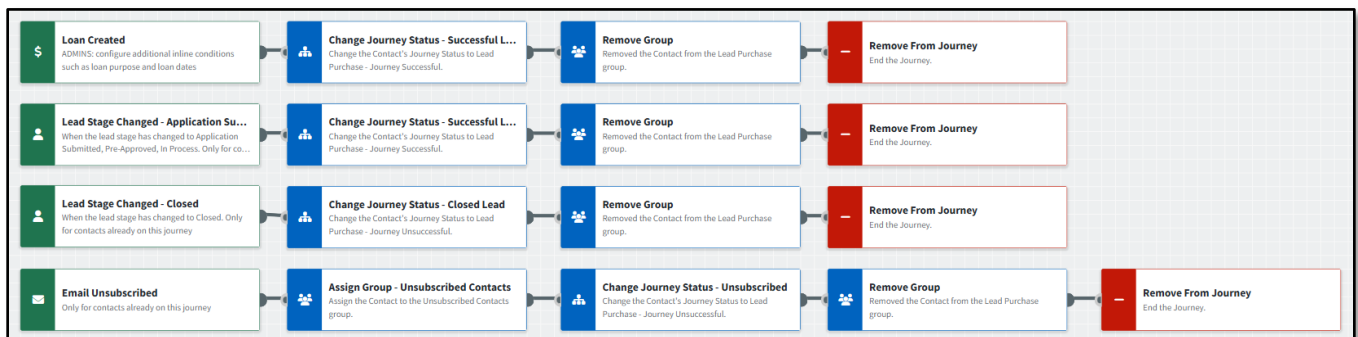
Only for contacts already on this journey ▼

Lead Stage

Closed ✕ ▼

Note
The Closed lead stage does not currently include separate Won or Lost designations.

Offramps After

Additional Recommendations

Determine whether another journey should be triggered based on a Lead Stage Change from this journey. For example, Application Started or Application Pull-Through journeys can be kicked off when the lead stage changes to Application Submitted.

Determine whether unsuccessful leads are added to a group for future outreach or another campaign.

Customer Intelligence Journeys (CI: Rate Example)

The following example can generally be applied to other customer intelligence journeys such as Rate, Mortgage Credit Inquiry, Listing, and Credit Improvement. Ensure that inline conditions and other event parameters correspond to each specific use case.

Onramps

Onramps Before
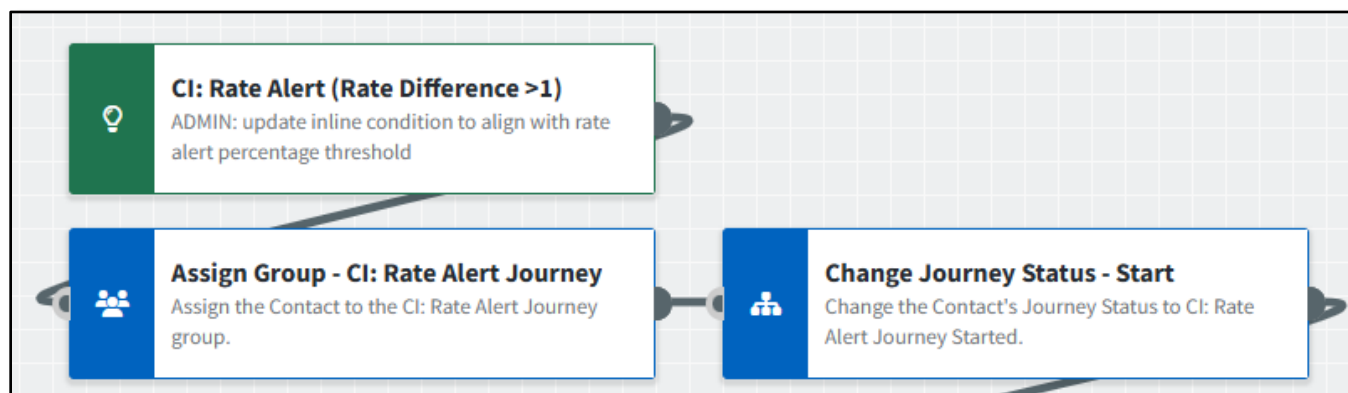
Steps to Update Onramps

1. Add new action: Create Lead
   a. Add after the Change Journey Status - Start event.
   b. Event parameters:
      i. In the Loan Purpose field, select **Refinance - Cash Out**.
      ii. Select a relevant option in the Lead Source field.
   c. Check the **Override Routing Policy** checkbox if both of the following are true:
      i. This journey will run in loan officers' accounts and create leads from their own contacts triggering CI alerts.
      ii. The lead source you selected has a routing policy assigned to it. If the lead source does not have a routing policy, checking this box is not necessary.
   d. In the Override User Type field, select **Contact Owner** if both of the following are true:
      i. This journey will run in loan officers' accounts and create leads from their own contacts triggering CI alerts.
      ii. You want those leads assigned directly to the loan officer.

Event Parameters

Loan Purpose *

Refinance - Cash Out ▾

Lead Source *

CI Rate Alerts ▾

☑ Override Routing Policy

Primary policy: CI Rate Leads

Override User Type

Contact Owner ▾

Done

Onramps After

CI: Rate Alert (Rate Difference >1)
ADMIN: update inline condition to align with rate alert percentage threshold

Assign Group - CI: Rate Alert Journey
Assign the Contact to the CI: Rate Alert Journey group.

Change Journey Status - Start
Change the Contact's Journey Status to CI: Rate Alert Journey Started.

Create Lead - CI Rate Alert
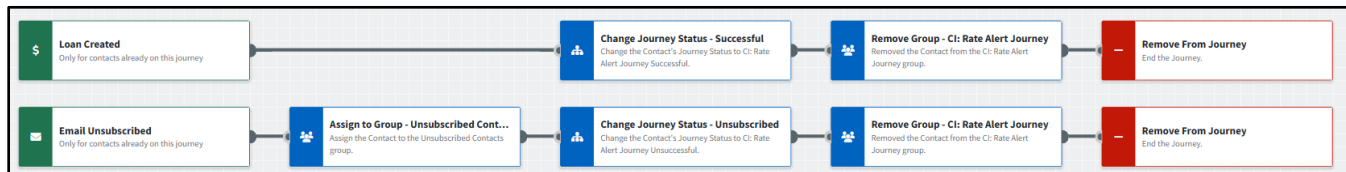Create a new lead with a loan purpose of Purchase and lead source of CI Rate Alerts. Override the ro...

Offramps

Offramps Before

Steps to Update Offramps

1. Add new trigger(s): Lead Stage Change
    b. Add 2 separate triggers for successful and unsuccessful outcomes.
        i. For the successful path event parameters:
            1. In the When Should This Trigger Happen? field, select **Only for contacts already on this journey**.
            2. In the Lead Stage field, select **Application Submitted**, **Pre-Approved**, or **In Process**.

        ii. For the unsuccessful path, under event parameters:
            1. In the When Should This Trigger Happen? field, select **Only for contacts already on this journey**.
            2. In the Lead Stage field, select **Closed**.

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Offramps After

Additional Recommendations

Determine whether another journey should be triggered based on a Lead Stage Change from this journey. For example, Application Started or Application Pull-Through journeys can be kicked off when the lead stage changes to Application Submitted.

Determine whether unsuccessful leads are added to a group for future outreach or another campaign.