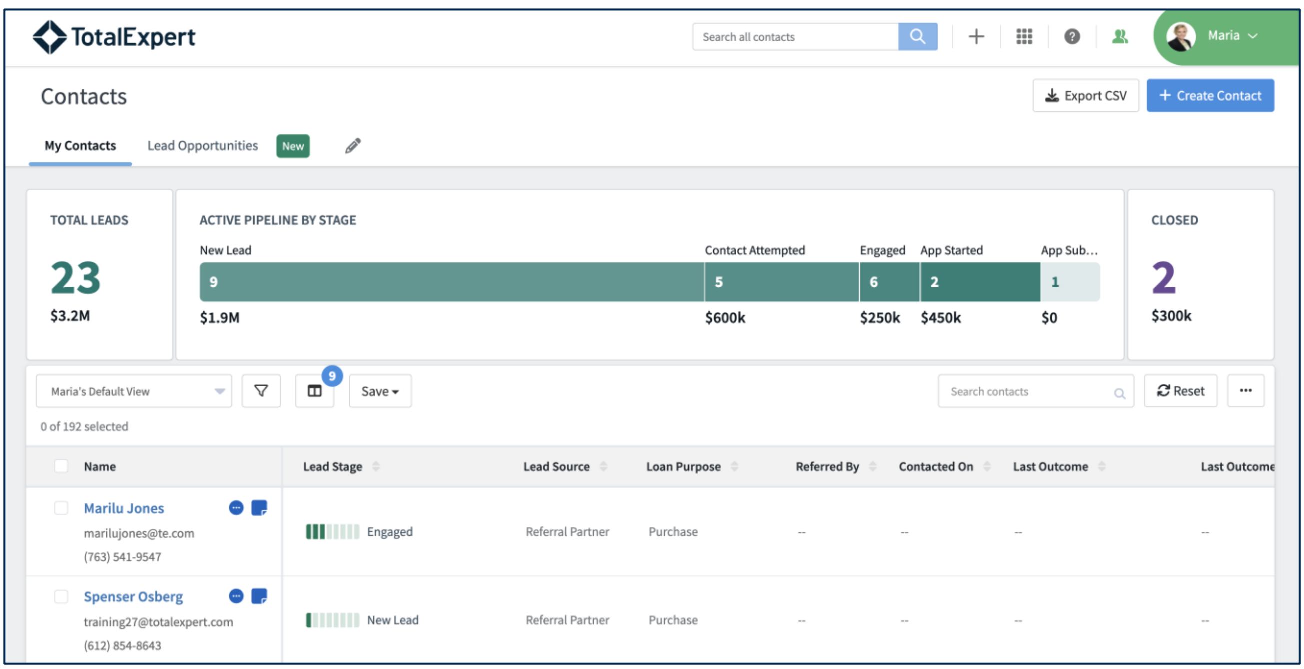
Lead Management for Loan Officers

This job aid helps Loan Officers efficiently manage leads in Total Expert — from creation through follow-up — so no opportunity is missed and every lead is tracked consistently.

- Locate leads
- Create leads
- Work leads
- Convert leads

Locate your Leads

- Navigate to **Contacts** — where you're already familiar with managing your contacts in Total Expert.
- Find all your leads visible under **My Contacts**. You may also see additional pipeline view tabs, configured by your marketing team to support you in locating priority leads.



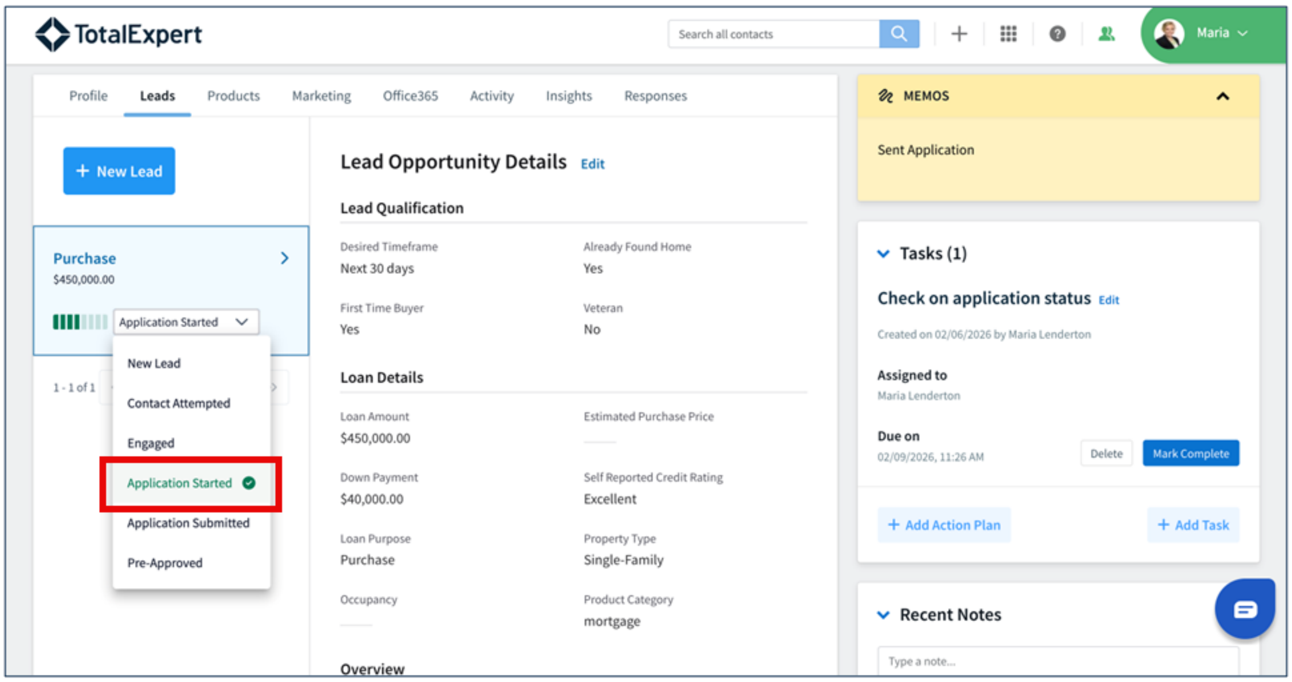
Create Referral Leads

You can create partner referral leads from two places.

- Click the **+** icon at the top of the window, then click **Create Lead**, or
- Open a contact record, click the **Leads** tab, then click the blue **+ New Lead** button.

Working Leads

- Leads created by Customer Intelligence alerts, input from a third party, or created by you yourself will be visible in the pipeline views.
- Leads take priority for outreach! Check on your leads regularly to ensure you are not missing deal potential. Best practice is to review your leads daily.
- When reaching out to a lead, open the record, view the **Lead Opportunity Details**, existing notes, and current lead stage for visibility into important details about the opportunity.
- After an interaction, log the outcome, update the stage to reflect their place in the process, log relevant information in notes, and assign yourself or your supporting team tasks to ensure follow up activities are completed.



Converting Leads – Three Tips

Tip 1 Login daily to review leads surfaced by your organization or by Customer Intelligence.

Tip 2 Add leads from referrals to ensure those leads don't slip through the cracks.

Tip 3 Leverage lead stages to accurately reflect interactions.

Best Practice Lists

Marketing teams will commonly create pipeline view tabs and lists on your behalf. If you do not have lists already created, here are the best practice lists you can save to make locating various leads easy on a day-to-day basis.

- All active leads
- List for each lead stage
- List for each lead source (including Customer Intelligence alerts)
- Leads created in the last two days
- Referral partner leads