

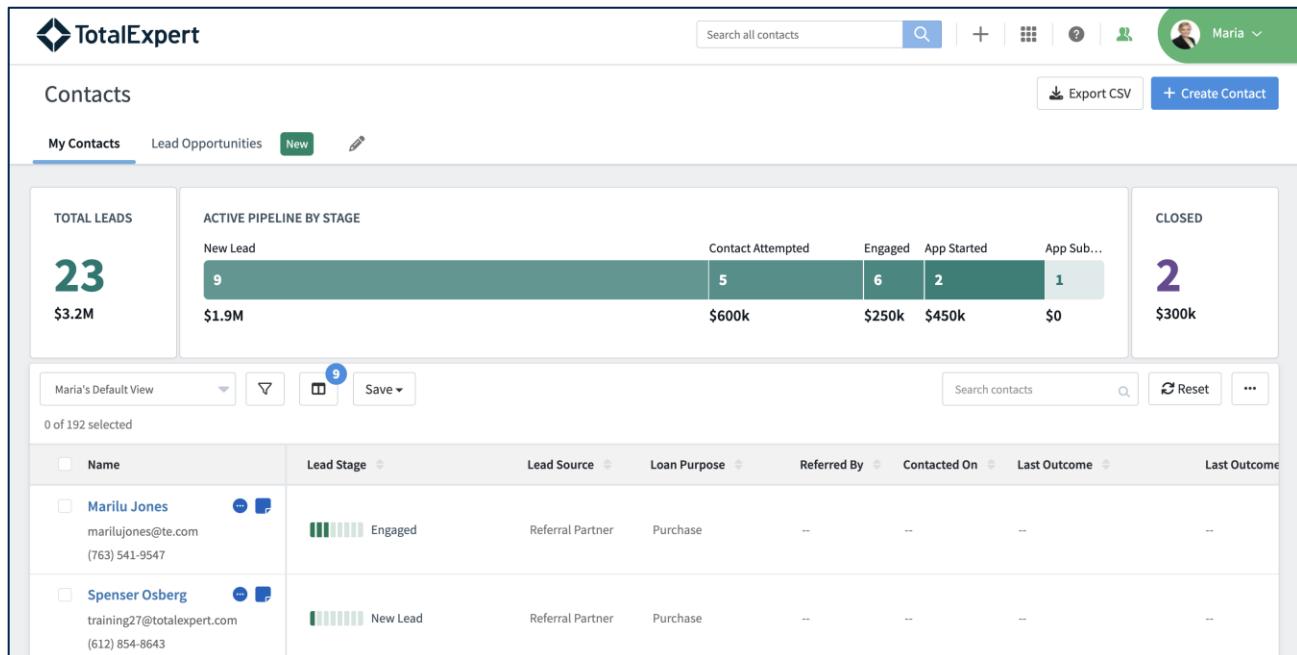
# Lead Management for Loan Officers

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.



**TOTAL LEADS**  
**23**  
\$3.2M

**ACTIVE PIPELINE BY STAGE**

New Lead	Contact Attempted	Engaged	App Started	App Sub...	CLOSED
9	5	6	2	1	<b>2</b> \$300k
\$1.9M	\$600k	\$250k	\$450k	\$0	

**0 of 192 selected**

Name	Lead Stage	Lead Source	Loan Purpose	Referred By	Contacted On	Last Outcome	Last Outcome
Marilu Jones marilujones@te.com (763) 541-9547	Engaged	Referral Partner	Purchase	--	--	--	--
Spenser Osberg training27@totalexpert.com (612) 854-8643	New Lead	Referral Partner	Purchase	--	--	--	--

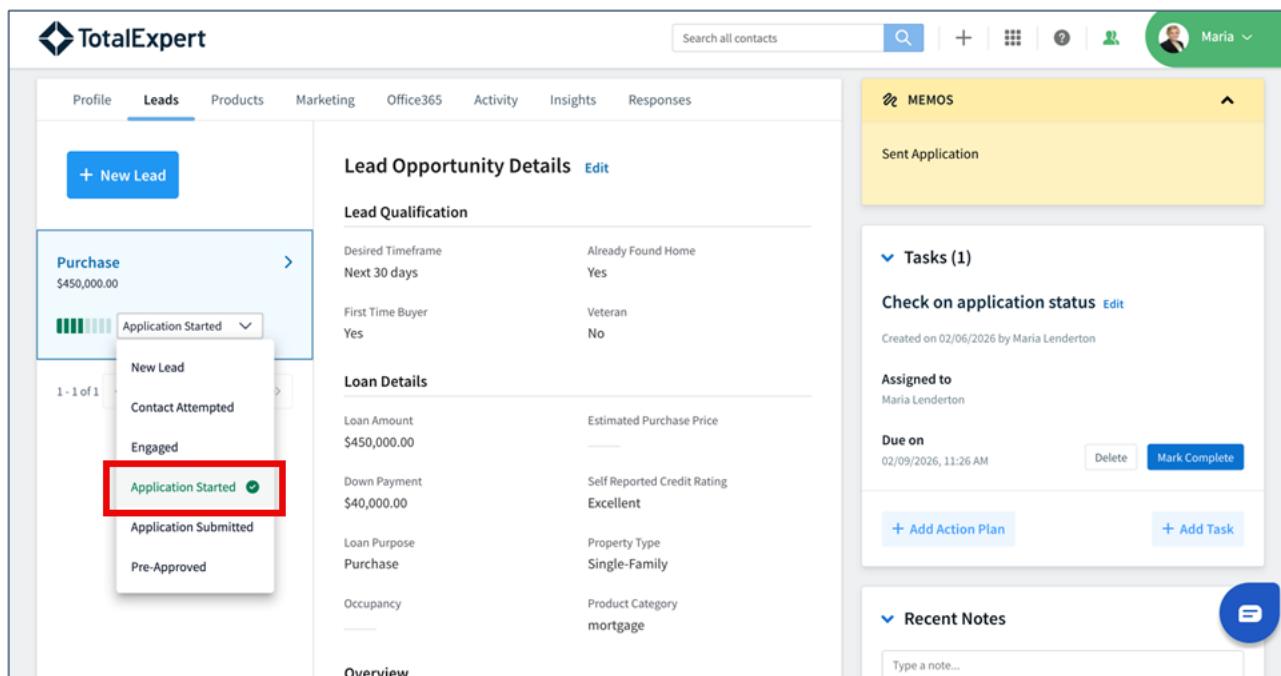
## Create Referral Leads

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.



The screenshot shows the Total Expert software interface. The top navigation bar includes Profile, Leads (selected), Products, Marketing, Office365, Activity, Insights, and Responses. A search bar and user profile for Maria are on the right. The main area has a pipeline view on the left with a 'Purchase' lead (">\$450,000.00) and a dropdown menu showing stages: New Lead, Contact Attempted, Engaged, Application Started (highlighted with a red box), Application Submitted, and Pre-Approved. The right side shows the 'Lead Opportunity Details' for this lead, including sections for Lead Qualification (Desired Timeframe: Next 30 days, Already Found Home: Yes; First Time Buyer: Yes, Veteran: No) and Loan Details (Loan Amount: \$450,000.00, Estimated Purchase Price: \$40,000.00, Self Reported Credit Rating: Excellent; Down Payment: \$40,000.00, Loan Purpose: Purchase, Property Type: Single-Family; Occupancy: Single-Family, Product Category: mortgage). To the right are sections for MEMOS (Sent Application), Tasks (1: Check on application status, Due on 02/09/2026, 11:26 AM, Assigned to Maria Lenderton, Mark Complete button), and Recent Notes (Type a note...).

## Converting Leads – Three Tips

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

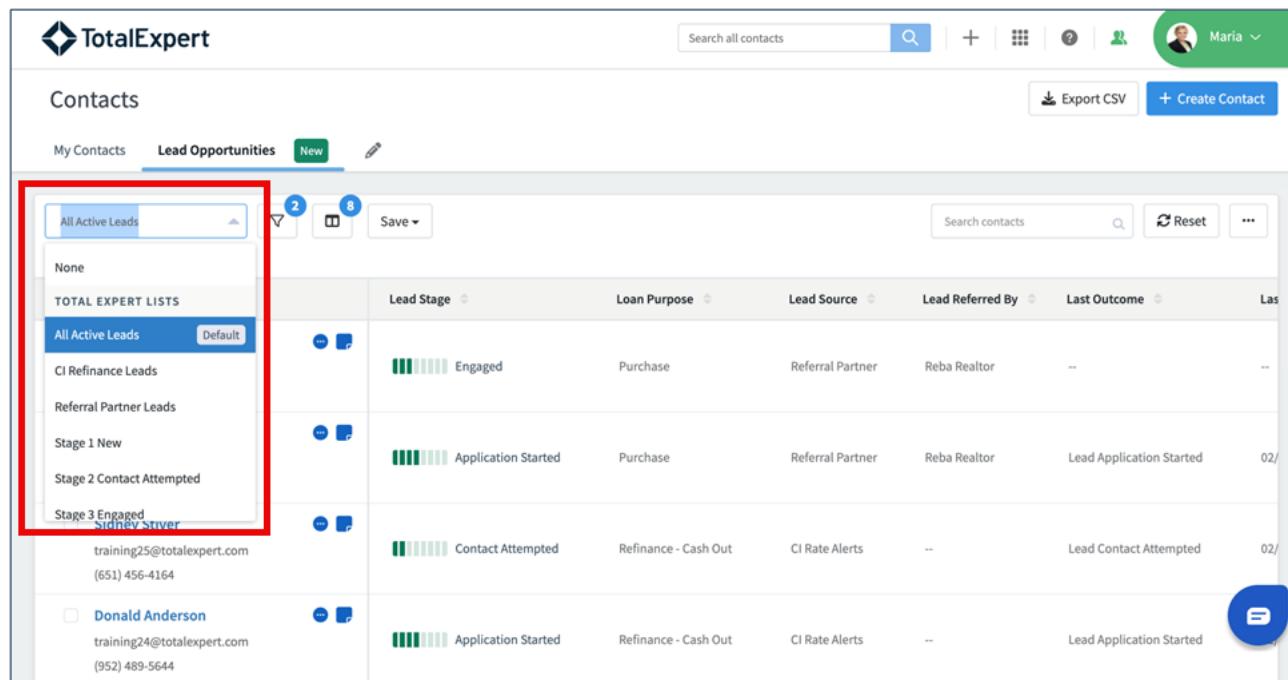
**Tip 2** Add leads from referrals to ensure those leads don't slip through the cracks.

**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



The screenshot shows the Total Expert software interface. At the top, there is a navigation bar with the Total Expert logo, a search bar, and a user profile for 'Maria'. Below the navigation bar is a 'Contacts' section. On the left, there is a sidebar with tabs for 'My Contacts' (selected), 'Lead Opportunities', and 'New'. The sidebar also features a 'Save' button and a dropdown menu labeled 'TOTAL EXPERT LISTS' which is currently set to 'All Active Leads'. The main area displays a table of leads with columns for Lead Stage, Loan Purpose, Lead Source, Lead Referred By, Last Outcome, and Last Contact. The first lead in the list is 'Engaged' with 'Purchase' as the loan purpose and 'Referral Partner' as the lead source. The second lead is 'Application Started' with 'Purchase' as the loan purpose and 'Referral Partner' as the lead source. The third lead is 'Contact Attempted' with 'Refinance - Cash Out' as the loan purpose and 'CI Rate Alerts' as the lead source. The fourth lead is 'Application Started' with 'Refinance - Cash Out' as the loan purpose and 'CI Rate Alerts' as the lead source. At the bottom right of the main area, there is a blue circular button with a white icon.