

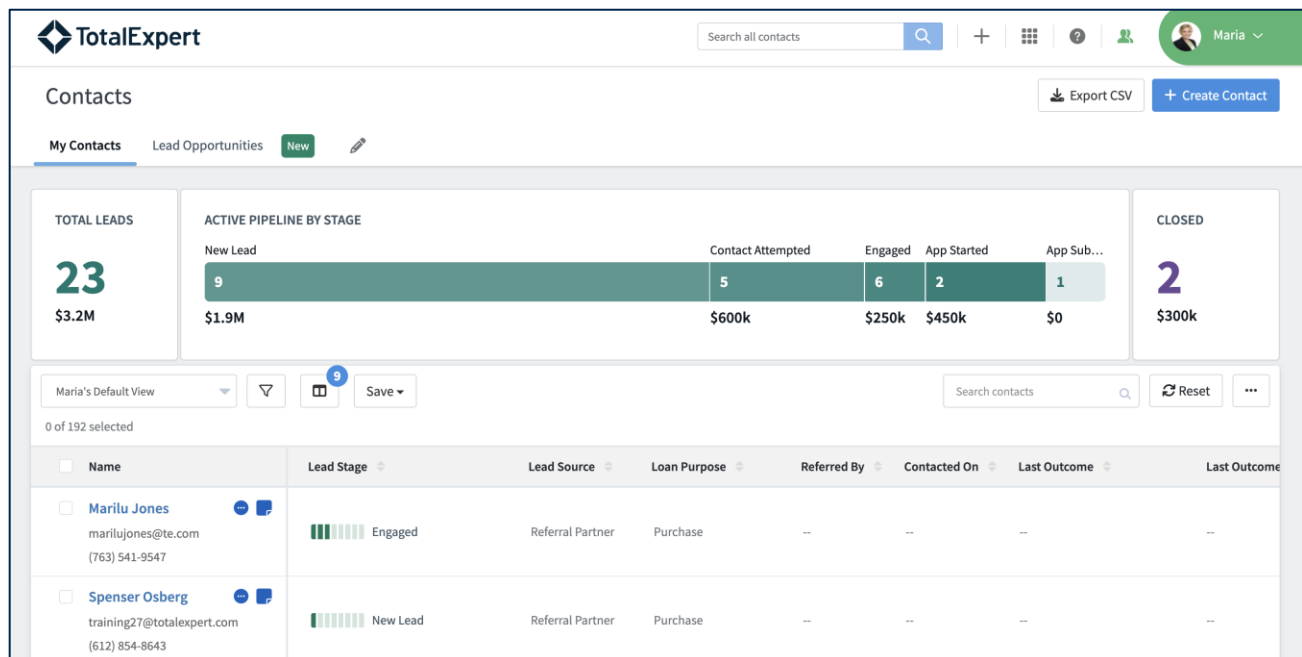
Lead Management for Loan Officers

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.

The screenshot shows the TotalExpert interface for a lead opportunity. The top navigation bar includes 'Profile', 'Leads', 'Products', 'Marketing', 'Office365', 'Activity', 'Insights', and 'Responses'. The 'Leads' tab is active. On the left, a 'New Lead' button is visible. Below it, a lead card for 'Purchase' (\$450,000.00) is shown with a progress bar and a dropdown menu. The dropdown menu is open, showing the following options: 'New Lead', 'Contact Attempted', 'Engaged', 'Application Started' (highlighted with a red box and a green checkmark), 'Application Submitted', and 'Pre-Approved'. The main content area is titled 'Lead Opportunity Details' and includes sections for 'Lead Qualification' and 'Loan Details'. The 'Lead Qualification' section shows 'Desired Timeframe' as 'Next 30 days' and 'Already Found Home' as 'Yes'. The 'Loan Details' section shows 'Loan Amount' as '\$450,000.00' and 'Estimated Purchase Price' as '\$40,000.00'. On the right, there are sections for 'MEMOS', 'Tasks (1)' (with a task 'Check on application status'), and 'Recent Notes'.

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 TotalExpert Contacts interface. At the top, there's a search bar for 'Search all contacts' and a user profile for 'Maria'. Below the search bar, there's a 'Contacts' section with tabs for 'My Contacts' and 'Lead Opportunities'. A 'New' button is also present. A dropdown menu is open, showing a list of 'TOTAL EXPERT LISTS' including 'All Active Leads' (marked as 'Default'), 'CI Refinance Leads', 'Referral Partner Leads', 'Stage 1 New', 'Stage 2 Contact Attempted', and 'Stage 3 Engaged'. The main table displays lead data with columns: Lead Stage, Loan Purpose, Lead Source, Lead Referred By, Last Outcome, and a 'Las' column. The table contains three rows of lead data.

Lead Stage	Loan Purpose	Lead Source	Lead Referred By	Last Outcome	Las
Engaged	Purchase	Referral Partner	Reba Realtor	--	--
Application Started	Purchase	Referral Partner	Reba Realtor	Lead Application Started	02/
Contact Attempted	Refinance - Cash Out	CI Rate Alerts	--	Lead Contact Attempted	02/