



Pipeline Views Playbook

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TOTAL EXPERT

Best Practice Tabs – Leads & Contacts

Below is an example framework from how you can set up your org level or individual lead/contact tabs in Total Expert. Best practices include Lead Management functionality. Customers who are not leverage these tools can skip ahead to page 7.

Tab	Leads / New Contacts	Active Calls (Insert Assistant Name)	CI Leads	In Process	Past Customers	Referral Partners
Best Practice Lists	All Active Leads**	All Calls	CI Refinance Leads**	Active Pipeline (Application to Funding)	All Past Clients	Buyers Agents
	New Leads in the Last 2 Days**	Credit Inquiry Calls	CI Equity Leads **	In Processing	Loan Anniversaries (Funded 1 year ago)	Sellers Agents
	Leads from Partners/personal**	Rate Calls	CI Credit Inquiry Leads**	In Underwriting	Rate & Term Refis (Above x%)	Attorneys
	Stage 1 New**	Mortgage Review Calls	CI Credit Improved Leads**	Clear to Close	All Funded Loans YTD	Builders
	Stage 2 Contact Attempted**		CI Listing Insight Leads**			Financial Advisors

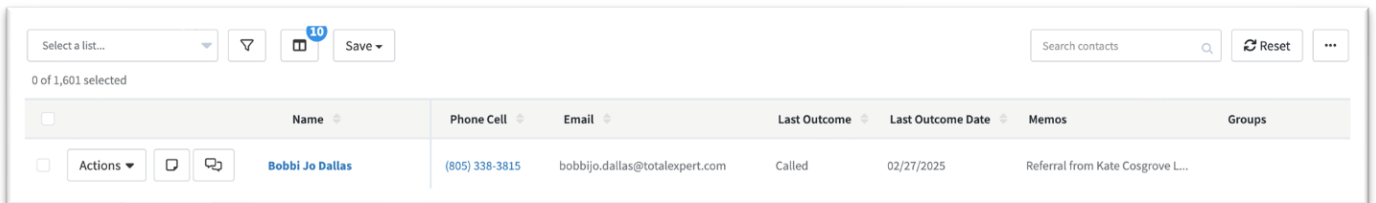


Stage 3 Engaged**		Life Event Leads** (Marriage, Divorce, New Parent)			Settlement Agents
Stage 4 Application Started**		LTV Below 70% (Equity Enriched)			
Stage 5 Application Submitted**		LTV Change - Above 80% to Below 80% (Equity Enriched)			
Stage 6 Pre-Approved**		Reverse Mortgage Opportunities (>50% Equity and 62 and Older)			
Stage 7 In Process**		HELOC and Cash-Out Opportunities (\$200k+ Equity)			
Stage 8 Closed**		Refi Opportunity < x monthly savings			
New Contacts - Last 30 Days		Refi Opportunity < x rate difference			
Incomplete Apps - Last 30 Days		LTV Below 70% (Equity Enriched)			
Complete Apps - Last 30 Days		LTV Change - Above 80% to Below 80% (Equity Enriched)			
Active Pre-Approvals		Reverse Mortgage Opportunities (>50% Equity and 62 and Older)			
Expiring Pre-Approvals					

Note: Lists with ** surface contacts based on information in their associated leads. Lead filters are used for this.

Best practices for setting up your Pipeline Views:

- Publish Pipeline Views to teams. Commonly used team “All Loan Officers.”
- Customize the columns and column order in each list (see image below for an example):
 - Last outcome
 - Last outcome date
 - Memos



- When Lead Management is in use, use Lead Filters to create Lead inclusive lists.
- Create the lists in the order in which you would like them to appear- last to first. The most recently created list will show at the top of the Pipeline View.



Best Practice Lists – Configuration Details

Lead Lists:

All Active Leads

- Inclusion:
 - Lead Management: Has Leads is yes
- Exclusion:
 - Lead Management: Lead Stage is Closed

Note: The inclusion rule “Lead Management: Has Leads is yes” is not needed when other lead specific filter criteria are used. The remaining lists will not leverage that rule.

New Leads in the Last 2 Days

- Inclusion:
 - Lead Management: Created At is in the last 2 days
- Exclusion: NA

Leads from Partners/personal

- Inclusion:
 - Lead Management: Lead Source is Personal Referral or Realtor Referral [choose the two lead sources you have created for personal or referral leads]
- Exclusion: NA

Stage 1 New

- Inclusion:
 - Lead Management: Lead Stage is New Lead
- Exclusion: NA

Stage 2 Contact Attempted

- Inclusion:
 - Lead Management: Lead Stage is Contact Attempted
- Exclusion: NA

Stage 3 Engaged

- Inclusion:
 - Lead Management: Lead Stage is Engaged
- Exclusion: NA

Stage 4 Application Started

- Inclusion:
 - Lead Management: Lead Stage is Application Started
- Exclusion: NA

Stage 5 Application Submitted

- Inclusion:
 - Lead Management: Lead Stage is Application Submitted
- Exclusion: NA



Stage 6 Pre-Approved

- Inclusion:
 - Lead Management: Lead Stage is Pre-Approved
- Exclusion: NA

Stage 7 In Process

- Inclusion:
 - Lead Management: Lead Stage is In Process
- Exclusion: NA

Stage 8 Closed

- Inclusion:
 - Lead Management: Lead Stage is Closed
- Exclusion: NA

New Contacts – Last 30 Days

Note: List will show new contacts added that are not yet tied to a loan. This could include manually added contacts, Lead Capture Apps, Single Property Websites, or 3rd party leads sources (Zillow, LendingTree, etc.)

- Inclusion:
 - Contact Information: Created on Date is created in the last 30 days
- Exclusion:
 - Mortgage Information: Creation Date is in the last 100 years

Incomplete Apps – Last 30 Days

Note: Will vary by POS/LOS used by the organization. Filters based on Loan Status or POS Status and created in the last 30 days.

- Inclusion:
 - Contact Information: Created on Date is created in the last 30 days
 - Mortgage Information: **Blend Application Status is Application in Progress**
- Exclusion:
 - Mortgage Information: Creation Date is in the last 100 years

Complete Apps – Last 30 Days

- Inclusion:
 - Contact Information: Created on Date is created in the last 30 days
 - Mortgage Information: **Blend Application Status is Application Completed**
- Exclusion:
 - Mortgage Information: Creation Date is in the last 100 years

Active Pre-Approvals

- Inclusion:
 - Mortgage Information: Pre-Approval Date is in the last 120 days [**choose date that works for your organization**]
 - Mortgage Information: Loan Status is Started [**select the status that refers to a loan not yet denied, in process, or closed**]
- Exclusion: NA



Expiring Pre-Approvals

- Inclusion:
 - Mortgage Information: Pre-Approval Expiration Date is in the next x days [choose time frame for organization]
 - Mortgage Information: Loan Status is Started [select the status that refers to a loan not yet denied, in process, or closed]
- Exclusion: NA

3rd Party Leads

- Inclusion:
 - Contact Information: Lead Source is x [select lead source vendor]
- Exclusion: NA

Active Calls:

Note: Best practice is to name your tab after your assistant. For example “Active Sami Calls.”

All Calls

- Inclusion:
 - Contact Information: Group is [select all pre-created groups for your organization]
 - Examples:
 - Group is AI Sales Assistant (Credit Inq.) – Working Leads
 - Group is AI Sales Assistant (Rate) – Working Leads
 - Group is AI Sales Assistant (PMR) – Working Leads
- Exclusion: NA

Credit Inquiry Calls

- Inclusion:
 - Contact Information: Group is AI Sales Assistant (Credit Inq.) – Working Leads [select pre-created groups for your organization]
- Exclusion: NA

Rate Calls

- Inclusion:
 - Contact Information: Group is AI Sales Assistant (Rate) – Working Leads [select pre-created groups for your organization]
- Exclusion: NA

Mortgage Review Calls

- Inclusion:
 - Contact Information: Group is AI Sales Assistant (PMR) – Working Leads [select pre-created groups for your organization]
- Exclusion: NA



Customer Intelligence Lists:

Note: If your organization is leveraging lead management to surface Customer Intelligence Opportunities, your loan officers will be able to see leads with alerts. We recommend surfacing those lead opportunities. If you do not leverage Lead Management, there are alternate suggestions below each alert for surfacing.

CI Refinance Leads

- Inclusion:
 - Lead Management: Has Leads is yes
 - Lead Management: Lead Source is CI Refinance Leads [select pre-created lead source for your organization]
- Exclusion: NA

CI Equity Leads

- Inclusion:
 - Lead Management: Has Leads is yes
 - Lead Management: Lead Source is CI Equity Leads [select pre-created lead source for your organization]
- Exclusion: NA

CI Credit Inquiry Leads

- Inclusion:
 - Lead Management: Has Leads is yes
 - Lead Management: Lead Source is CI Credit Inquiry Leads [select pre-created lead source for your organization]
- Exclusion: NA

CI Credit Improved Leads

- Inclusion:
 - Lead Management: Has Leads is yes
 - Lead Management: Lead Source is CI Credit Improved Leads [select pre-created lead source for your organization]
- Exclusion: NA

CI Listing Insight Leads

- Inclusion:
 - Lead Management: Has Leads is yes
 - Lead Management: Lead Source is CI Listing Insight Leads [select pre-created lead source for your organization]
- Exclusion: NA

Life Event Leads (Marriage, Divorce, New Parent)

- Inclusion:
 - Lead Management: Has Leads is yes
 - Lead Management: Lead Source is CI Life Event Leads [select pre-created lead source(s) for your organization]
- Exclusion: NA



Note: The below lists are for organizations leveraging Customer Intelligence but not Lead Management.

Credit Alerts - Last 7 Days

- Inclusion:
 - Insights: Insight Types is Customer Intelligence: Credit Inquiry Alert
- Exclusion: NA

Listing Alerts - Last 7 Days

- Inclusion:
 - Insights: Insight Types is Property listed in the last 7 days
- Exclusion: NA

Rate Alerts - Last 7 Days

- Inclusion:
 - Insights: Insight Types is Customer Intelligence: Rate Alert
- Exclusion: NA

Tip: Add additional columns to these lists: Loan number, rate, new rate, rate difference remaining balance, monthly payment, monthly savings, 3-year savings, 5-year savings, funded date

Equity Alerts – Last 7 Days

- Inclusion:
 - Insights: Insight Types is Customer Intelligence: Equity Alert
- Exclusion: NA

Life Events Insights:

Life Event Insights (Marriage, Divorce, Parent)

- Inclusion:
 - Insights: Insight Type is Life Event Alert: New Baby or Life Event Alert: New Divorce or Life Event Alert: New Marriage
- Exclusion: NA

Tip: Add additional columns to these lists: Life Events – Divorced, Married, Parent

Additional Equity Enrichment Lists:

LTV Below 70%

- Inclusion:
 - Customer Intelligence - Equity: LTV is less than or equal to 70.00%
- Exclusion: NA

LTV Change - Above 80% to Below 80% (Equity Enriched)

- Inclusion:
 - Mortgage Information: Loan-to-Value is greater than or equal to 80.000%
 - Customer Intelligence – Equity: LTV is less than or equal to 80.00%



- Exclusion: NA

HELOC and Cash-Out Opportunities (\$200k+ Equity)

- Inclusion:
 - Customer Intelligence - Equity: Equity \$ is greater than or equal to \$200000
- Exclusion: NA

Reverse Mortgage Opportunities (>50% Equity and 62 and Older)

- Inclusion:
 - Customer Intelligence - Equity: Equity % is greater than or equal to 50.00%
 - Contact Information: Age is greater than or equal to 62 [requires birth year]
- Exclusion: NA

Additional Rate Enrichment Lists:

Refi Opportunity: Monthly savings

- Inclusion:
 - Customer Intelligence - Rate Monitoring: Monthly Savings is greater than or equal to [x]
- Exclusion: NA

Refi Opportunity: Rate difference

- Inclusion:
 - Customer Intelligence - Rate Monitoring: Rate Difference is greater than or equal to [x]
- Exclusion: NA

Tip: Add additional columns to these lists: Loan number, rate, new rate, rate difference remaining balance, monthly payment, monthly savings, 3-year savings, 5-year savings, funded date

In Process Lists:

Note: All of these lists will vary based on the loan statuses the organization has mapped from their LOS to TE.

Active Pipeline (Application to Funding)

- Inclusion:
 - Mortgage Information: Loan Status is [include all statuses that you map between application to funding]
- Exclusion: NA

In Processing:

- Inclusion:
 - Mortgage Information: Loan Status is Processing [your organization's status for In Processing]
- Exclusion: NA

In Underwriting:

- Inclusion:



- Mortgage Information: Loan Status is Underwriting [your organization's status for In Underwriting]
- Exclusion: NA

Clear to Close

- Inclusion:
 - Mortgage Information: Loan Status is Clear to Close [your organization's status for Clear to Close]
- Exclusion: NA

Past Customer Lists:

All Past Clients

- Inclusion:
 - Mortgage Information: Funded Date in last 100 years
- Exclusion:
 - Email Activity: Email Activity is Unsubscribed
 - Contact Information: Silenced Communication is on

Loan Anniversaries that month (Funded 1 year ago)

- Inclusion:
 - Mortgage Information: Funded Date is in the last 13 months
- Exclusion:
 - Mortgage Information: Funded Date is in the last 12 months
 - Mortgage Information: Loan Purpose is Refinance [if targeting purchase loans]

Rate & Term Refis (Above x%)

- Inclusion:
 - Mortgage Information: Interest Rate is greater than or equal to x% [choose rate for organization]
- Exclusion:
 - Mortgage Information: Funded Date is in the last 6 months [may vary based on EPO policy]

All Funded Loans YTD

- Inclusion:
 - Mortgage Information: Funded Date is from 2024-01-01 to not specified
- Exclusion: NA

Referral Partners Lists:

Note: Groups may vary by organization

Buyers Agents

- Inclusion:
 - Contact Information: Group is Buyers Agent
- Exclusion: NA



Sellers Agents

- Inclusion:
 - Contact Information: Group is Sellers Agents
- Exclusion: NA

Attorneys

- Inclusion:
 - Contact Information: Group is Attorneys
- Exclusion: NA

Builders

- Inclusion:
 - Contact Information: Group is Attorneys
- Exclusion: NA

Financial Advisors

- Inclusion:
 - Contact Information: Group is Financial Advisors
- Exclusion: NA

Settlement Agents

- Inclusion:
 - Contact Information: Group is Settlement Agents
- Exclusion: NA

Additional List Ideas:

Journeys:

You can create a marketing tab where you can have a filtered list for each of your core journeys that tells your LOs which contacts are currently on it.

[Journey name]:

- Inclusion:
 - Journey: Currently Active Journey is [Journey name]
- Exclusion: NA

Follow Ups:

You can create a tab that targets last outcome selected in the system.

Left Voicemail

- Inclusion:
 - Contact information: Last Outcome is Left Voicemail
- Exclusion: NA



Follow-Up Call:

- Inclusion:
 - Contact information: Last Outcome is Follow-Up Call
- Exclusion: NA

Tip: Add additional columns to these lists: Last Outcome, Last Outcome Date, Memos