Planning Worksheet for LO Journeys Rollout

Complete the following worksheet to help you and your teams prepare to launch your Journeys and Expert Content to loan officers.

Journeys made available for Loan Officers at launch:

Name of journey	
Description/Goal of this journey	
Groups/teams/LOs who will have access	
Notes	

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Description/Goal of this journey	
Groups/teams/LOs who will have access	
Notes	

Name of journey	
Description/Goal of this journey	
Groups/teams/LOs who will have access	
Notes	

Journeys coming soon:

Name of journey to be rolled out	
Description/Goal of this journey	
Groups/teams/LOs who will have	
Notes	

Name of journey to be rolled out	
Description/Goal of this journey	
Groups/teams/LOs who will have access	
Notes	

Name of journey to be rolled out	
Description/Goal of this journey	
Groups/teams/LOs who will have access	
Notes	

Journey permissions:

☐Activate for all users
☐Available to activate (opt in)
☐Available to deactivate (opt out)
☐Allow users to manually add contacts to a journey
☐Allow users to manually stop this journey
☐Allow users to trigger scheduled events on this journey
☐Make available as a template

Other notes about permissions: Click or tap here to enter text.

Who should loan officers contact for support or with questions on journeys? Click or tap here to enter text.

When will the *Expert Content and Journeys for Loan Officers* training session occur? Click or tap to enter a date.

Link to recording of *Expert Content and Journeys for Loan Officers* training session: Click or tap here to enter text.

Best Practices for rolling out Expert Content and journeys to loan originators:

- Adopt an “all in, all on” strategy and opt all loan originators in to available journeys, but give users the option to opt in or opt out.
- On initial rollout, encourage originators to use journeys without modifying them.
- Start with simple journeys and use a pilot group before scaling up.
- Plan how to assign access to existing journeys for new users.
- Ensure all end users attend training.
- Monitor journey statistics and progress.