

Expert Content Strategy Guide

CI: Life Events – New Child (Mortgage)

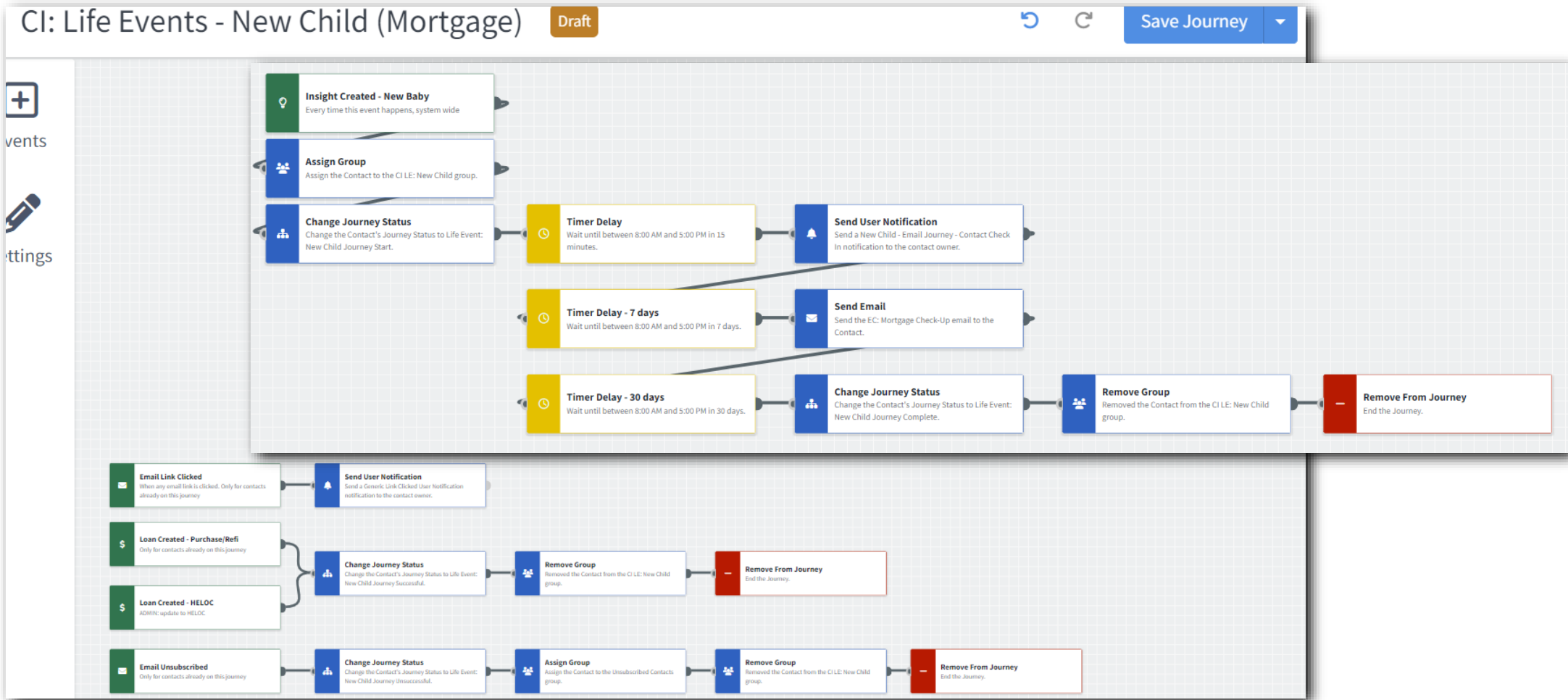


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Email, user notifications

This journey is intended for use with Customer Intelligence Life Event insights for a new baby. An initial user notification is sent when the insight is received alerting the contact owner that the contact has started the journey and encouraging an informal check in. An email offering a free mortgage check up due to life changes. If the contact clicks a link during the journey, a second generic “link clicked” user notification is sent. Contacts are offboarded when a HELOC or new mortgage loan (refi or purchase) is created, or after the journey concludes.

**All communications should be reviewed prior to initiating the journey.*



Journey Map Notes:

- Keep emails that work for your organization, swap with custom, or add these emails to your existing campaigns.
- Adjust onramps with organization specific groups and Focused View outcomes.

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Hi Teddy,

Life happens. If your financial situation has changed or unforeseen events are causing you to re-think your finances, I'd like to offer you a complimentary mortgage check-up. You may benefit from one of these options:

Refinancing to a lower interest rate or different mortgage product. If you would like to adjust your monthly payments, let's look into changing your loan's term.

Equity-based lending solutions with competitive interest rates. For example, your financial situation may improve with a home equity line of credit (HELOC) or a home equity loan. These products provide funds for home improvements, debt consolidation, or other financial goals.

Best regards,

Media Team Admin

Email Subject:

- Is it time for a mortgage check-up?

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User Notification: New Child - Email Journey - Contact Check In

The contact's household below has received a Life Event insight for a new child and may benefit from a general check in on their accounts. They will receive an email after 7 days offering a free mortgage checkup.

Contact name: {{contact.f_name}} {{contact.l_name}}

User Notification: Generic Link Clicked User Notification

The below contact clicked a link from within a journey email. Visit their contact details page for additional information.

Contact name: {{contact.f_name}} {{contact.l_name}}

Contact email: {{contact.email}}

Contact phone: {{contact.phone}}