Expert Content Strategy Guide

Loan Officer Recruiting

**TotalExpert**®

Loan Officer Recruiting

Emails and suggested talking points

This journey can be configured to meet the needs of each customer's recruiting strategy. There are four pre-built email templates with areas to customize by lender as well as 4 suggested email talking points. These communications are designed to educate a loan officer recruit on your organization, its processes/technology, and the benefits of working for your company.

Customers with loan officer recruitment data can configure this journey to trigger on integrations connected to TE. Focused View Outcomes can also be configured to trigger this journey depending on the organization's specific workflows.

Journey status change components are included but statuses will need created and configured throughout the wireframe based on customer's needs.

All communications should be reviewed prior to initiating the journey.
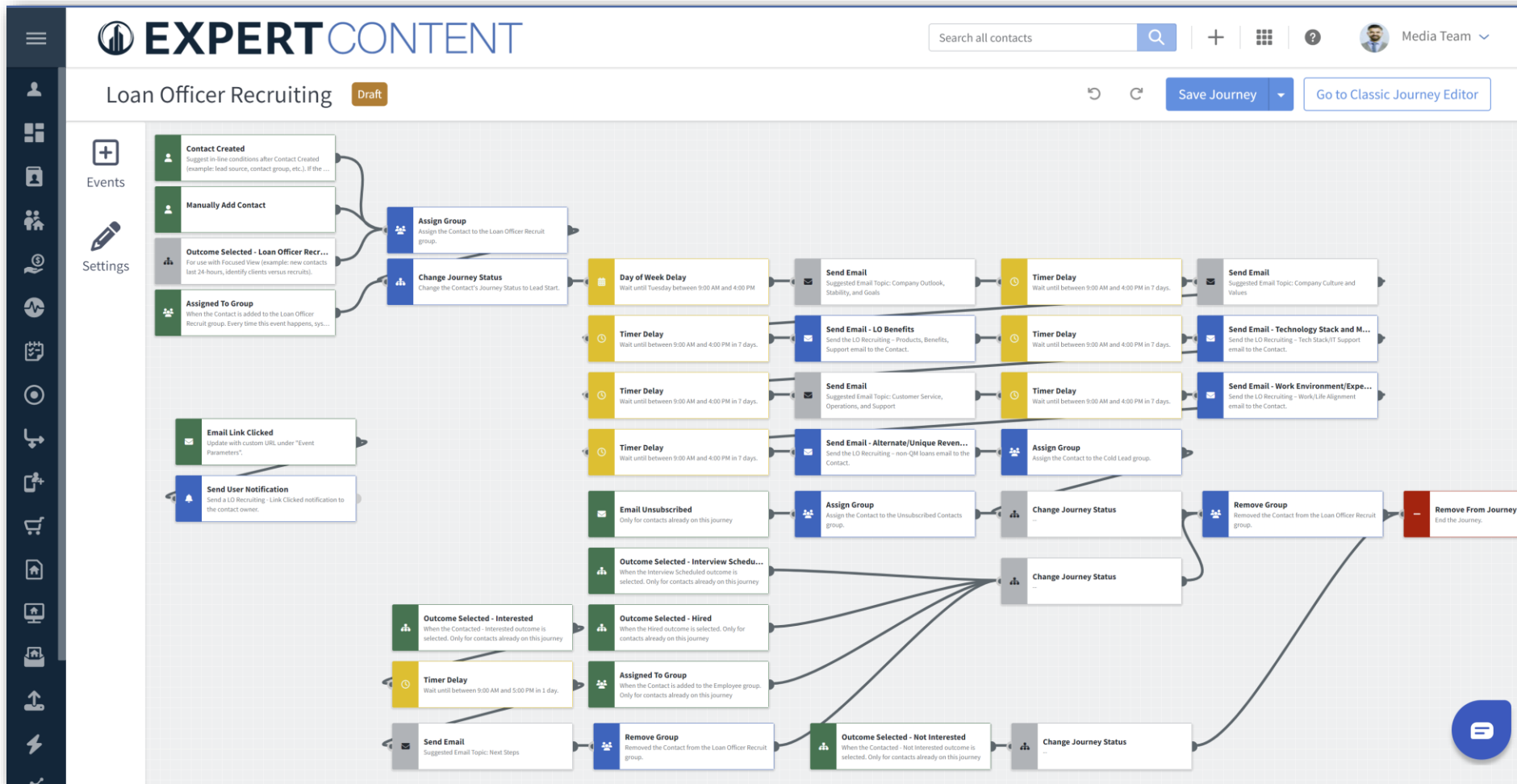
Journey Map Notes:

➢ Keep emails that work for your organization, swap with custom, or add these emails to existing campaigns.
➢ Grey components are to be configured by customers. Grey email components include suggested topics.
➢ Adjust onramps with organization specific groups and Focused View outcomes.

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Hello Aubrey,

Many sales pros are considered money-making machines by the lenders they represent. They're rewarded with extra commissions, shiny awards, and three or four days at a fancy resort every spring.

Some loan originators have come to realize that work/life balance is more important. If you're one of them, here are a few things to consider:

- Does your manager know why you're selling mortgages instead of smaller, simpler products?
- Do they share your sense of accomplishment when you approve a buyer that other lenders turned down?
- Do they spend the same amount of time with their families as you'd like to?
- Do they operate with the same ethical workplace standards as you?

[Lender inserts corporate mission statement, 'pillars of success', etc here.]

Want to learn more? Contact me in confidence at (123) 456-7890 or ExpertContent@TotalExpert.com.

Hello Aubrey,

A recent survey of would-be homebuyers discovered that flexibility is their #1 demand. Are you able to offer them what's most important to them?

Non-QM loan solutions can be the difference between a closing and an Adverse Action letter. Today's workforce includes self-employed workers, small business owners and those who are thriving freelancers and contractors. But most conforming and government-sponsored loans aren't designed to assist them.

You may also have a growing database of real estate investors who come to you for financing. But what if their next purchase puts them over the limit for your available loans?

Start saying Yes more often with Expert Content.

[Lender personalizes with list of their non-QM and portfolio loans]

In addition to these loan solutions, Expert Content provides loan originators with:

- A comprehensive benefits package that includes [xxxxx].
- State-of-the-art loan originations software that helps you get to closing on time, every time.
- [Details of support team]

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Hello Aubrey,

Does your lender's technology performance measure up to your own performance?

Have you ever worked to have a loan processed and underwritten quickly, only to have a closing postponed by outdated systems? If you're tired of making excuses, it's time to make a move to a lender who can put your deals in the fast lane...and keep them there.

Tech stack: [Revise benefits of each technology partner as needed]

- Marketing Automation: Total Expert
  - Intelligent, data-driven, and automated customer outreach (from you!)
  - On-demand library of personalized print, email, and social content
  - Referral partner capabilities: co-branded marketing materials, lead capture landing pages and single property sites.
  - Easily create rate-integrated content (and include your agents' listings)
- CRM/Contact Management: [Insert CRM here]
  - Create and manage contact lists (and archive those excel spreadsheets)
  - Quickly identify new opportunities
  - Daily email with new contacts, birthdays, and more.
- Loan Origination System: [Insert LOS here]
  - Loan process automation
  - Digital closings
  - Data accuracy and compliance adherence

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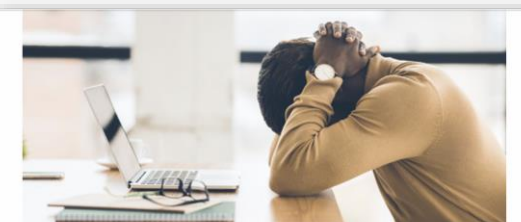
Hi Aubrey,

If you're 100% happy where you are now, congrats. If you're not, read on.

We've noticed that your sales performance is way above most other loan originators. Are you being properly rewarded? Do you have the right products for more homebuyers, including the ones with so-so credit scores? And does share your values and outlook?

Here's what Expert Content would like to offer you:

- A full suite of lending products, including [xxx].
- A comprehensive benefits package that includes [xxxxx].
- State-of-the-art loan originations software that helps you get to closing on time, every time.
- [Details of support team]

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Email Subject:
- LO Recruiting – Work/Life Alignment (SL: The best sales jobs aren't all about sales.)
- LO Recruiting – non-QM loans (SL: Do you have the right loans for more of your customers?)
- LO Recruiting – Tech Stack/IT Support (SL: The best loans aren't the best if they don't close on time.)
- LO Recruiting – Products, Benefits, Support (SL: Has your career hit a speed bump?)

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Additional suggested email topics included in wireframe:

➢ Company outlook, stability, goals

➢ Customer service, operations, and support

➢ Company culture and values

➢ Next steps for interested candidates