Creating Customers for Life Checklist

Daily Tasks

- ☐ Reach out to borrowers in high-need loan statuses.
- ☐ Call contacts with birthdays.
- ☐ Review Focused View daily for Customer Intelligence opportunities.
  - ☐ Reach out to drive automation.
  - ☐ Log outcomes to keep a detailed record of communication.
- ☐ Check your email for opportunities to follow up on.

Weekly Tasks

- ☐ Check in with loan files that are moving ahead smoothly.
- ☐ Schedule your social media posts for the week.

Ongoing Tasks

- ☐ Create contact lists and views based on market needs.
- ☐ Reach out to past borrowers on anniversaries and other post-close milestones.
- ☐ Analyze email stats periodically and follow up with high-value engagement.

Tips

- ☐ Review email content going out on your behalf from journeys.
- ☐ Create loan lists to surface borrowers in all different milestones.
- ☐ Be aware of the tools and automation you have to support you.
- ☐ Make sure your Daily Digest is turned on.