Locked In on Lead Nurture Checklist

What to Do Right After Training

- ☐ Review how to navigate the platform, including the navigation menu, dashboard, and persistent buttons.
- ☐ Verify loan and contact data.
- ☐ Confirm that everything in your Account Settings and Marketing Profile is correct.
- ☐ Ensure all Notification Settings are turned to **Yes**.
- ☐ Connect to key integrations, such as Outlook and social media.
- ☐ Create a Home Loan Lead Form lead capture app and share it on social media.
- ☐ Create a contact list that would generate opportunities right now.
    - ☐ Examples: contacts who come in via Home Loan Lead Form lead capture app, referred contacts, and so on.
- ☐ Make sure you are opted in to the Lead Nurture journey and are aware of the triggers, email content, and off-ramps.

Ongoing

- ☐ Reach out to new contacts using Focused View and select appropriate outcomes to drive automation and/or document the interaction.
- ☐ Check other Focused Views to find other high-value opportunities.
- ☐ As the market changes, think of new opportunities to create contact lists of individuals who could benefit.
- ☐ Review the Help Desk for more information on Total Expert features.
- ☐ Provide feedback to your marketing administrator:
    - ☐ Requesting new marketing materials
    - ☐ Platform updates