

GOOD VIBE SQUAD'S

UNFAIR ADVANTAGE™

BORROWER PIPELINE

**AUTOMATION
CHEAT SHEET**

The Borrower Pipeline tracks “Pre-Approved” borrowers as they move through the different stages all the way into “Funded.”

This pipeline is built with hybrid automation in mind. However, we want to avoid sending duplicate messages, so by default, this pipeline is used mainly for tracking purposes.

If you have your own LOS system to manage your clients as they move through the “Pre-Approved” stage all the way to “Funded,” then that software may come with its own automated messages that it sends out to your clients.

For this reason, most of the stages in your Borrower Pipeline don't come with automated messages.

We don't want your clients to receive duplicate automated messages from both LoanMore CRM and your own LOS system.

However, we are able to add in automations to your Borrower Pipeline on an as needed basis.



01 PRE-APPROVED

HOW DOES THE LEAD ENTER THIS STAGE? **Automatic (System Moves Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- In the Prospect Pipeline: when you manually move a lead to Pre-Approved, this triggers the system to automatically create a duplicate Lead Card and then move that lead into the Pre-Approved Stage of your Borrower Pipeline.
- No automations are being sent out (to prevent duplicate messages from your LOS system).
- Use this stage to track in real time how many borrowers are Pre-Approved.

02 IN CONTRACT

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- This stage is for borrowers who are now In Contract.
- No automations are being sent out (to prevent duplicate messages from your LOS system).
- Use this stage to track in real time how many borrowers are In Contract.

03 DISCLOSURES

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- This stage is for borrowers who have been sent the Disclosures.
- No automations are being sent out (to prevent duplicate messages from your LOS system).
- Use this stage to track in real time how many borrowers have been sent Disclosures.

04 IN PROCESSING

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Import Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- This stage is for borrowers who are In Processing.
- No automations are being sent out (to prevent duplicate messages from your LOS system).
- Use this stage to track in real time how many borrowers are In Processing.

05 UNDERWRITING

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Import Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- This stage is for borrowers who are now in the Underwriting phase.
- No automations are being sent out (to prevent duplicate messages from your LOS system).
- Use this stage to track in real time how many borrowers are in the Underwriting phase.

06 CONDITIONAL APPROVAL

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Import Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- This stage is for borrowers who have been Conditionally Approved.
- No automations are being sent out (to prevent duplicate messages from your LOS system).
- Use this stage to track how many borrowers have been Conditionally Approved.

07 CLEAR TO CLOSE

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Import Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- This stage is for borrowers who are now Clear to Close!
- No automations are being sent out (to prevent duplicate messages from your LOS system).
- Use this stage to track how many borrowers are Clear To Close.

08 DOCS OUT

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Import Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- This stage is for borrowers who have their Docs Out to sign.
- No automations are being sent out (to prevent duplicate messages from your LOS system).
- Use this stage to track how many borrowers are in the Doc Out phase!

09 FUNDED

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Import Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**



- Congratulations! This stage is for borrowers who have Closed on their Loan!
- Once the lead closes on their loan, move them into the "Funded" stage.
- This will trigger the system to automatically follow up with your client, prompting them to write you a review. Positive reviews will be publicly posted. Any negative reviews are sent to you privately.
- Later down the line, the system will automatically follow up with your clients to get you more refinance deals in the future!