

GOOD VIBE SQUAD'S

# UNFAIR ADVANTAGE™

## PROSPECT PIPELINE

# AUTOMATION CHEAT SHEET

## 01 NEW LEADS

HOW DOES THE LEAD ENTER THIS STAGE? **Automatic (System Moves Lead)**

DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**

STAGE DURATION: **30 Days (Move to Reactivation after 30 days)**



- This stage is where leads first enter your pipeline.

When a lead submits the initial application, offers their contact info, and consents to be contacted, this triggers the lead to automatically enter your pipeline into the "New Leads" stage.

- What happens after a lead enters this stage?

They will receive the New Leads automated follow up messages such as voicemails, texts and emails. These follow ups are designed to start a conversation between you and that New Lead. Once the New Lead responds, they will move to "In Contact" and the automated follow ups will stop.

*\*You cannot drag and drop someone back into "new leads" to start the new leads follow-ups again.*

## 02 BOOKED APPOINTMENT

HOW DOES THE LEAD ENTER THIS STAGE? **Automatic (System Moves Lead)**

DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**

STAGE DURATION: **4 automations from scheduling to time of appointment**



- This stage is for leads who have scheduled an appointment in your calendar.

- What happens after a lead enters this stage?

The system will automatically send reminders to your lead about the upcoming appointment.

This Booked Appointment will also sync with your calendar. Calendar syncing is important for 2 reasons:

1. Once a Booked Appointment is synced to your calendar, LoanMore CRM will send you reminders to show up on your scheduled appointment.
2. Syncing these Booked Appointments to your calendar ensures that you're never double booked.

## 03 NO SHOW

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**  
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**  
STAGE DURATION: **5 days (Move to Reactivation after 5 days)**



- This stage is for leads who scheduled an appointment with you but did not show up to their booked appointment.
- What happens after a lead enters this stage?

Once you move these leads into "No Show," this allows the system to automatically follow up with that lead to reschedule.

## 04 REACTIVATION

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**  
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**  
STAGE DURATION: **1 year (Move to Not Yet Ready after 1 year)**



- For leads who are no longer receiving automatic follow ups and you'd like to see if they are still interested. (Recommended for: New Leads who finished the New Lead campaign and never booked an appointment, No Shows who never rebooked, and leads that have stopped responding)
- What happens after a lead enters this stage?

Once you move a lead into "Reactivation," the system will begin following up with them for the next year to see if they are still interested in buying a home.

## 05 IN CONTACT

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



- When a lead reaches back out to you (either through text, email, or calling your LoanMore CRM assigned phone number), the system automatically puts that lead into "In Contact."
- What happens after a lead enters this stage?

In this stage, the leads are not getting follow ups. Instead, these leads are waiting for your response, so it's up to you to keep in touch with them.

- What happens once you respond to an "In Contact" lead?
- They will remain "In Contact" until you move them to another stage.

## 06 HOLDING

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



- This stage is for leads who wish not to be contacted for a set time period.

For example, a lead may tell you that he or she is going on vacation for 2 weeks, and that lead does not want to be contacted during those 2 weeks.

- What happens after a lead enters this stage?

Once you move a lead into the "Holding" stage, leads do not receive any automations.

*In this situation, it's important that you add a Task to remind yourself to reach back out to that lead after the "Holding" period.*

# 07 NOT YET READY

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**  
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**  
STAGE DURATION: **1 year**



- This stage is for leads who are not quite ready to buy a home.

For example, a lead may tell you over the phone that he or she isn't interested in buying a home until 6-12 months from now.

- What happens after a lead enters this stage?

This will trigger the system to automatically follow up with that lead over a year-long period.

This is a very powerful tool that helps you get deals from people reaching back out to you 6-12 months down the road when they're ready.

# 08 CREDIT REPAIR

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**  
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**  
STAGE DURATION: **1 year**



- This stage is for leads who need more time to improve their credit.

- What happens after a lead enters this stage?

When you move a lead into "Credit Repair," the system will send the lead monthly follow ups over a year-long period.

These follow ups include resources to help these leads improve and repair their credit score.

This is a very powerful tool designed to help you get deals from people reaching back out to you once they've improved their credit.

# 09 1003 STARTED

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**  
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Not by default**  
**If you'd like this campaign turned on, contact support**  
STAGE DURATION: **12 days**



- This stage is where you put your leads that started the application over the phone, but you weren't able to get them to the phase where you request their documents.

- What happens after a lead enters this stage?

Once you move a lead into "1003s Started," the system will send the lead follow-ups to remind them to complete the application.

# 10 DOCS REQUESTED

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**  
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**  
STAGE DURATION: **12 days**



- Once a lead agrees to upload or send in the requested documents, you can move that lead to the "Docs Requested" stage.

- What happens after a lead enters this stage?

The system will send the lead follow ups to remind them to upload documents.

# 11

## 1003 COMPLETED

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**

DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**

STAGE DURATION: **--**



- This stage is for leads that have completed the 1003 application and submitted their documents, but you haven't gotten them pre-approved.
- What happens after a lead enters this stage?

This stage doesn't send out any automations to the lead. The "1003 Completed" stage is for your own organizational purposes.

# 12

## PRE-APPROVAL

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Move Lead)**

DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**

STAGE DURATION: **--**



- This stage is for leads who have been pre-approved.

**Action Needed:** Put in the Loan Amount to the **Lead Value** inside the **Lead Card** to track your metrics accurately.

- What happens when a lead enters this stage?

This will automatically create a Duplicate Lead card in the Borrower Pipeline.

Once this Pre-Approved lead enters your Borrower Pipeline, you can now track their progress from "Pre-Approval" to a "Funded Loan".