










LEADS360 MORTGAGE 2.2 BEST PRACTICE WORKFLOW

updated on: 11/19/2010

NEW   	
Called: No Contact	Contact Attempt 1
Called: Contacted/Call Back	Contacted/Call Back
Called: Left Message	Contact Attempt 1
Pitched Loan	Contacted/Call Back
Application Taken	Application
Does Not Qualify	Manager Review
Not Interested	Nurture
Bad Phone Number	Nurture
Bad Lead: Return to Vendor	Return to Vendor
General Comment	-




CONTACT ATTEMPT 1-4  	
Called: No Contact	Contact Attempt 2 - 4
Called: Contacted/Call Back	Contacted/Call Back
Called: Left Message	Contact Attempt 2 - 4
Pitched Loan	Contacted/Call Back
Application Taken	Application
Does Not Qualify	Manager Review
Not Interested	Nurture
Bad Phone Number	Nurture
Bad Lead: Return to Vendor	Return to Vendor
General Comment	-

CONTACT ATTEMPT 5 	
Called: No Contact	Nurture
Called: Contacted/Call Back	Contacted/Call Back
Called: Left Message	Nurture
Pitched Loan	Contacted/Call Back
Application Taken	Application
Does Not Qualify	Manager Review
Not Interested	Nurture
Bad Phone Number	Nurture
Bad Lead: Return to Vendor	Return to Vendor
General Comment	-

CONTACTED/CALL BACK   	
Called: No Contact	-
Called: Contacted/Call Back	-
Pitched Loan	-
Application Taken	Application
Does Not Qualify	Manager Review
Not Interested	Nurture
Bad Phone Number	Nurture
Bad Lead: Return to Vendor	Return to Vendor
General Comment	-


APPLICATION 	
Called: No Contact	-
Called: Contacted/Call Back	-
Application Withdrawn	Manager Review
Funded Loan	Funded
Submitted	Submitted
General Comment	-

SUBMITTED	
Called: No Contact	-
Called: Contacted/Call Back	-
Funded Loan	Funded
Does Not Qualify	Manager Review
General Comment	-

NURTURE   	
Called: No Contact	-
Called: Contacted/Call Back	Contacted/Call Back
Pitched Loan	-
Application Taken	Application
Does Not Qualify	Manager Review
Not Interested	-
Bad Lead: Return to Vendor	Return to Vendor
General Comment	-

EMAIL	RECIPIENT	STATUS
[LEAD] 1st Call: Left Message (Auto)	Lead	Contact Attempt 1
[LEAD] 3rd Call: Left Message (Auto)	Lead	Contact Attempt 3
[LEAD] 6th Call: Left Message (Auto)	Lead	Nurture
[LEAD] BAD Phone Number (Auto)	Lead	Nurture
[LEAD] Blank Email Template 1	Lead	ALL
[LEAD] Blank Email Template 2	Lead	ALL
[LEAD] Contact Made: Here is my contact information (Auto)	Lead	Contacted/Call-back
[LEAD] Contacted Lead: Sent day 07 (Auto)	Lead	Contacted/Call-back
[LEAD] Contacted Lead: Sent day 14 (Auto)	Lead	Contacted/Call-back
[LEAD] Contacted Lead: Sent day 21 (Auto)	Lead	Contacted/Call-back
[LEAD] Contacted Lead: Sent day 30 (Auto)	Lead	Contacted/Call-back
[LEAD] Contacted Lead: Sent day 60 (Auto)	Lead	Contacted/Call-back
[LEAD] Nurture Lead: Sent day 007 (Auto)	Lead	Nurture
[LEAD] Nurture Lead: Sent Day 014 (Auto)	Lead	Nurture
[LEAD] Nurture Lead: Sent Day 021 (Auto)	Lead	Nurture
[LEAD] Nurture Lead: Sent Day 030 (Auto)	Lead	Nurture
[LEAD] Nurture Lead: Sent Day 060 (Auto)	Lead	Nurture
[LEAD] Nurture Lead: Sent Day 090 (Auto)	Lead	Nurture
[LEAD] Nurture Lead: Sent Day 120 (Auto)	Lead	Nurture
[LEAD] Nurture Lead: Sent Day 150 (Auto)	Lead	Nurture
[LEAD] Nurture Lead: Sent Day 180 (Auto)	Lead	Nurture
[LEAD] Welcome_email (Auto)	Lead	New
[MGR] Lead for Review (Auto)	Manager	Manager Review
[USER] New Lead Notification (Auto)	User	New

FUNDED	
Called: No Contact	-
Called: Contacted/Call Back	-
General Comment	-

MANAGER REVIEW 	
Dead	Dead
Change to Nurture	Nurture
Called: Contacted/Call Back	Contacted/Call Back
General Comment	-

RETURN TO VENDOR/DEAD	
General Comment	-

LEGEND:


ACTION

STATUS CHANGE

 Drip email trigger

 Email trigger

 Redistribute

 Reminder

 Notification