

Marketing Wednesday

January 22, 2024





Agenda

- **Poll Questions**
- **Best Practice for Insight**
- **Pipeline Views**
- **Q&A**



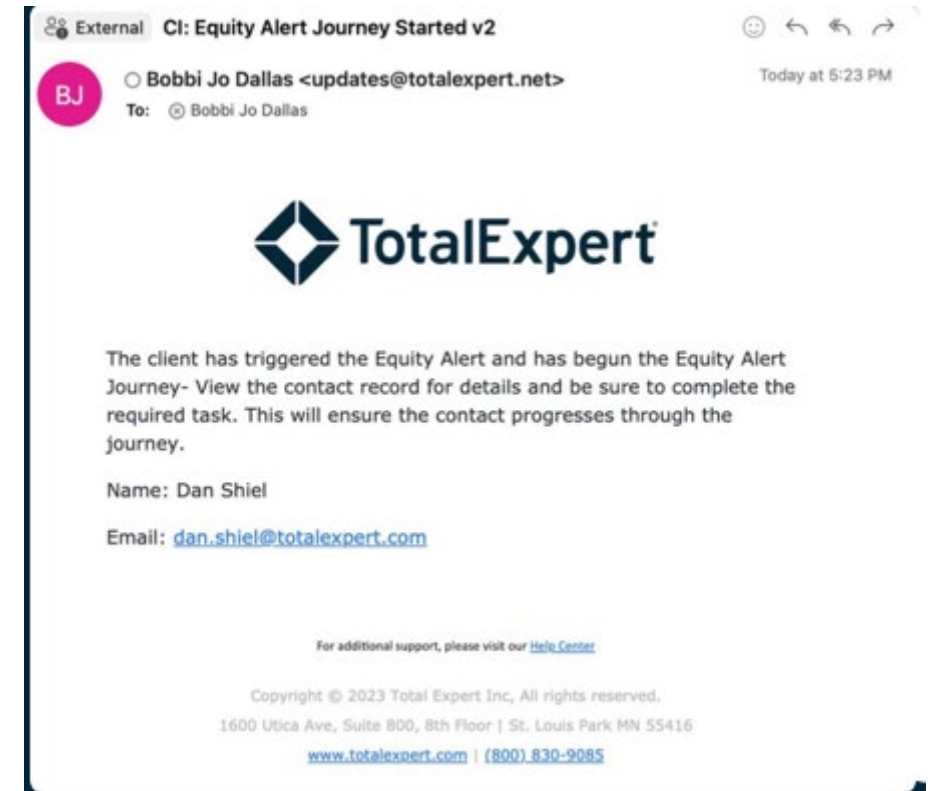
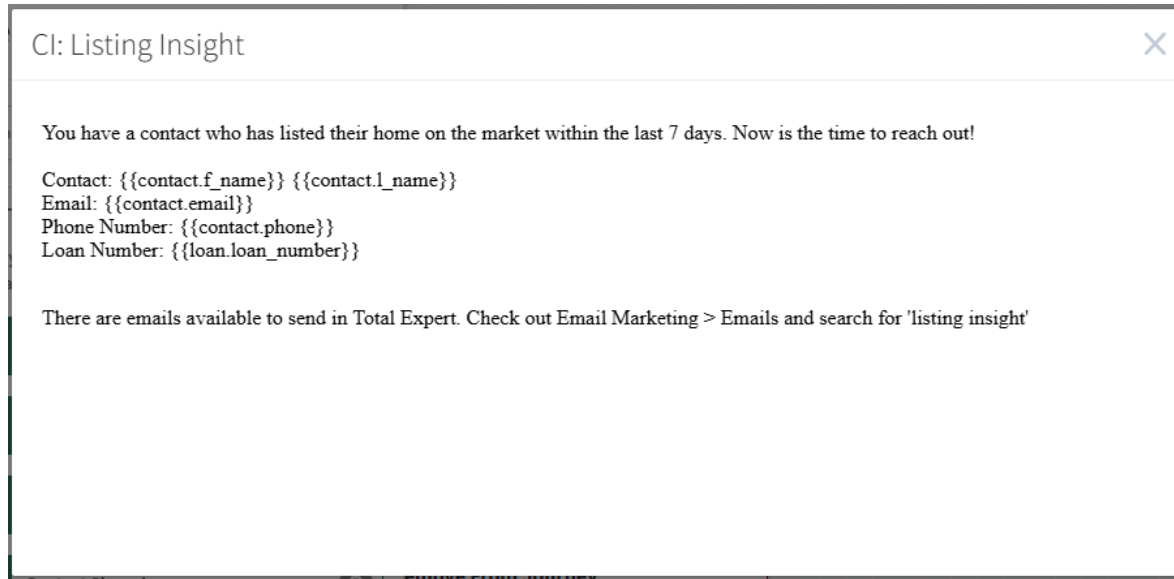
QUESTIONS

- **Have you received or seen an insight from TE?**
- **Have you logged into TE to see the pipeline views or view an insight lead?**
- **Have you successfully contacted a borrower from an insight?**

BEST PRACTICES

1. Recognize Customer Intelligence Alerts

Email notification ex.



BEST PRACTICES

2. Login to Total Expert (migconnect.com)

3. Search contact name

Dashboard

Leads & Contacts

Focused View

Search Contacts

Contacts

Groups

Settings

Do Not Contact List

Co-Marketing Partners

Loans

Activity Stream

Tasks

Campaigns

Journeys

Lead Capture Apps

Print Marketing

Web Marketing

Email Marketing

MIGconnect

Search all contacts

Export CSV

Create Contact

My Contacts

All Contacts

CI - LTV Below 70%

Active

CI - LTV Below 80%

Active

CI - Credit Alert

Active

CI - Listing Alerts

Active

CI - Rate Alerts

Active

Select a list...

▼

▼

9

Save ▼

Search contacts

Reset

...

0 of 200,463 selected

<input type="checkbox"/>	Name	Phone Cell	Email	Groups	Referred By	Contacted On	Outcome	Outcome Date	Cr
<input type="checkbox"/>	<div>Actions</div> Jeff Gilley	(910) 471-6701	jeff.gilley@migonline.com	Birthday people, All Contacts,...	--	01/20/2025	--	--	
<input type="checkbox"/>	<div>Actions</div> Frankie Kao	--	frankie.kao@migonline.com	Birthday people, All Contacts,...	--	01/20/2025	--	--	
<input type="checkbox"/>	<div>Actions</div> Dan Simms	--	dan.simms@migonline.com	Birthday people, All Contacts,...	--	01/21/2025	--	--	
<input type="checkbox"/>	<div>Actions</div> Shanon Winebarger	--	shanon.winebarger@migonline.com	Birthday people, All Contacts,...	--	01/21/2025	--	--	
<input type="checkbox"/>	<div>Actions</div> Amanda Shroder	--	amanda.shroder@migonline.com	Birthday people, All Contacts,...	--	01/21/2025	--	--	
<input type="checkbox"/>	<div>Actions</div> Dillon Hilling	--	dillon.hilling@migonline.com	Birthday people, All Contacts,...	--	01/21/2025	--	--	
<input type="checkbox"/>	<div>Actions</div> Julie Brannon	--	julie.brannon@migonline.com	Birthday people, All Contacts,...	--	01/21/2025	--	--	
<input type="checkbox"/>	<div>Actions</div> Rolfe Deshazor	--	rolfe.deshazor@migonline.com	Birthday people, All Contacts,...	--	01/21/2025	--	--	
<input type="checkbox"/>	<div>Actions</div> Brandy Denson	--	brandy.denson@migonline.com	Birthday people, All Contacts,...	--	01/21/2025	--	--	

BEST PRACTICES

4. Evaluate opportunity based on contact information. Use *products* & *insights* tab to understand the client history from TE

[< Contacts](#)

Tina Andrews

3816 Seyfert Avenue, North Las Vegas, NV 89084 | (702) 738-7115 | tinaza702@gmail.com

[Call](#) [Email](#) [Schedule](#) [Actions](#)

PROPERTY LISTED IN THE LAST 7 DAYS
Tina's property at 3816 Seyfert Ave, North Las Vegas, NV was listed for sale within the past 7 days.
Created 01/16/2025

[Profile](#) [Products](#) [Marketing](#) [Office365](#) [Activity](#) [Insights](#) [Responses](#)

Profile Details [Edit](#)

Full Name Tina Andrews	Email Address tinaza702@gmail.com	Cell Phone Number (702) 738-7115
Home Address 3816 Seyfert Avenue, North Las Vegas, NV, 89084	Date of Birth 07/15/1975	Lead Source BlueSage
Created On 01/16/2025	Last Contacted 01/19/2025	External ID 63518

Professional Details [Edit](#)

Employer frankfort regional medical center/HCA	Employer Address 299 Kings Daughters Drive, Frankfort, KY, 40601
--	--

MEMOS

Tasks (0)

Recent Notes

Type a note...

Select Outcome (optional)

☐ Hide note from co-marketing partners [?](#) [+ Add Note](#)

[View all](#)

TIP: KEEP TE OPEN

BEST PRACTICES

5. Contact lead via text/call

Ex. Talk Tracks

Customer Intelligence Talk Track:

Close relationship (phone call)

“Hey [first name], you know that you’re in my system and that I get alerts whenever an opportunity arises to help you. What type of financing are you looking for?”

Working relationship (text message)

“Hey [first name], it’s [LO name] here. We have not spoken in a bit, and as your trusted mortgage advisor, I wanted to remind you that I am always available to assist you with all things mortgage-related. Please do not ever hesitate to reach out to me with any questions. If I do not get a response in 24 hours, I follow up with a phone call.

Listing insight specific (same phone/text protocol)

Hey [first name], I noticed that you listed your home for sale, and the pictures look awesome on Realtor.com! Are you staying local or moving out of town? For your new purchase, I would love the opportunity to provide you with the same high level of service as before. My team and I can now lend in every state (except NY), so please let me know what your plans are and how I can help!

BEST PRACTICES

6. Note outcome in TE contact

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Actions ▾

💡

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Professional Details

Edit

Employer

frankfort regional medical center/HCA

Employer Address

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Tasks (0)

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Type a note...

Select Outcome (optional)

Hide note from co-marketing partners ?

+ Add Note

View all

LEVERAGE PIPELINE VIEWS

Login to TE > Click Leads & Contacts > Click Contacts

- **Contacts will automatically populate in Pipeline Views**
- **View and evaluate all opportunities from one place**
- **Make game plan for action!**

The screenshot displays the MIGconnect web application interface. On the left is a dark sidebar with navigation links: Dashboard, Leads & Contacts (expanded), Contacts, Groups, Settings, Do Not Contact List, Co-Marketing Partners, Loans, Activity Stream, Tasks, Campaigns, Journeys, Lead Capture Apps, Print Marketing, Web Marketing, Email Marketing, and Import Data. The main content area is titled 'Contacts' and features a top bar with a search bar, a '+ Create Contact' button, and an 'Export CSV' button. Below the title, there are tabs for 'My Contacts' and 'All Contacts', followed by several filter buttons: 'CI - LTV Below 70%', 'CI - LTV Below 80%', 'CI - Credit Alert', 'CI - Listing Alerts', and 'CI - Rate Alerts'. A dropdown menu shows 'Select a list...' and a 'Save' button. The contact list table has columns: Name, Phone Cell, Email, Groups, Referred By, Contacted On, Outcome, and Outcome Date. The first few contacts listed are Jeff Gilley, Frankie Kao, Dan Simms, Shanon Winebarger, Amanda Shroder, Dillon Hilling, Julie Brannon, Rolfe Deshazor, and Brandy Denson. At the bottom, there is a pagination bar showing '1 - 25 of 200,463' and a set of page numbers (1, 2, 3, 4, 5, ..., 8019).

QUESTIONS?

WE ARE HERE FOR YOU!



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