



MORTGAGE MASTERMIND
— ELITE —

Mortgage Milestone Communication Plan



The Defining Difference
BY CINDY ERTMAN

CINDY ERTMAN
The Defining Difference
TheDefiningDifference.com
info@CindyErtman.com
Phone: 310-295-1130
NMLS #330850



Mortgage Milestone Communication Plan

Having an effective communication plan that keeps clients and referral partners informed throughout the loan process will help you set yourself apart from the competition and shine a light on your greatest strength as a communicator. In today's virtual world, the home buying experience can leave your clients feeling disconnected. By providing a clear, step-by-step plan as to what each stage of the loan process will look like and how you will be corresponding with them, you will bring a level of support and comfort to your clients that will help build loyalty in the years to come.

You can customize the below list to mirror your loan flow and communication process. Share this plan with your clients and your Realtor partners at the beginning of the loan process to establish greater trust and confidence and to help create a stress-free client experience.

Be sure to establish the preferred method of communication with your clients and referral partners and log it in their file. Select a day that works for both of you as a weekly checkpoint in addition to the touch points below.

The 10 Point Communication Plan

1. You have been pre-qualified / pre-approved
2. We have received the borrower's loan application
3. The appraisal has been ordered
4. The loan package has been submitted to processing
5. The appraisal has come in at value
6. The loan has been submitted to underwriting for approval
7. Congratulations! The loan has been approved
8. The loan documents have been ordered and will be sent to closing
9. Congratulations! The loan has funded
10. Congratulations on your new home!