



Denise Donoghue's Video to Explain CRM Set Up



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VIDEO TO EXPLAIN CRM SET UP

https://youtu.be/eZRNK_FKzbU

	A	B	C	D	E	F	G			
1	Lead Workflow:									
2	Name	Template Name	Method	Interval	Time:	Target	Marketing Piece	V		
3	Follow Up	1st Lead FU email	Email	1 Day	9:02am	Clients				
4	Lead Update	1st Lead Status update to Referrer	Email/Text	1 Day	9:05am	Partner				
5	LO/LOA to call lead: 2 Days	Lead FU call	Email	2 Days	8:00am	LO/LOA				
6	Touching Base	2nd Lead FU email	Email	3 Days	9:24am	Clients				
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	Lead	Prospect	Mortgage Lab	PreQualify	PreApprove	Executed Contract	Funded	Employee Connection	Attraction	+