



MORTGAGE MASTERMIND
ELITE

Stacia Weishaar's Lead to Legacy Process



The Defining Difference
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Owner	Task	Method of Delivery
LEADS		
SW/KH	Lead Referral Note - To Client	Email
SW/KH	SW facilitates initial client consultation	
SW/KH	SW enters lead details into AT & completes client intake form - notes anything to Vicki about family, pets, etc.	AT
VM	Check data in AT and manage status of lead in lead tab	
VM	Vicki - notes file with pets, kids, hobbies - for ultimate client experience	
VM	Enters lead into SF & Attach to Agent	SalesForce
SW/KH	Determines if putting Client on Drip Campaign in SF Hot Lead or FTHB or Credit Repair	
VM	Thank You Note to referring contact for the lead	Handwrytten
AK	Goal is to take application via phone or transfer to team member	
SW/KW/TEAM	New Application - Pre-Approval Next Steps (introduce team) & CC Agent	Email
Alyssa/VM	VM send email to Alyssa Contact for Connection on LinkedIn/FB/IG	
APPLICATION RECEIVED		
AK	Thank You Note - Prequalification/Application Received & Docs Uploaded - to Client	Email
AK	Thank You Note - Prequalification/Application Received & NO DOCS - to Client	Email
AK	Thank You Note - Prequalification/Application Received - to Agent	Email
AK	Client & agent added to Pre-approval Tab in AT Once Application In - Status to "Needs Docs" Review & issue pre-approval within same day. Update by EOB to agent and client and finalize within	
AK	24 hours - NEED TEMPLATE	Email
AK	If No Docs - Email to Agent Same Day of App	Email
AK	Pre-Approval Results & Updated Needs List - to Client. Call Client First then Email dated sent client	Email
AK	Pre-Approval Results - to Agent	Email
VM	Send new BUYER agents Team Weishaar booklet	Issuu/Email
AK	Changed Status in AT to Springboard	
AK	Create preapproval letter - save to share drive and send editable PDF to team	PDF
VM/SF Automati	Add client to prequal DRIP Prequal Campaign in SF	SalesForce
VM	If client had not identified a property send water bottle and NUUN with handwritten note	USPS USPS or Digital Book
AK	Prep Package for SB meetings if Meeting is over the phone send digitally	via Issuu Mortgage
AK	Send Stacia Snippet of Pricing for Mortgage Coach Cost Analysis	Coach
AK	Send TCA - Mortgage Coach Email on day of springboard	Email
AK	Changed Status in AT to Pre-Approved	
SW/KH	Stacia to Tell Team if moving to EB Approval (THIS IS ON HOLD CURRENTLY)	Email Email & MBS Highway & Bomb Bomb
SW/KH	Rent vs. Buy	
AK	If moving to EB Approval Disclosures Created and Send Email About Disclosures (CURRENTLY ON HOLD NO EB)	Email
AK	Create file summary notes send to Chelsea for 10 day Early Bird Approval (CURRENTLY ON HOLD NO EB)	

PROPERTY IDENTIFIED

AK	Re-run LOS, send rates & MI (if applicable) to SW and update TCA to be sent to client.	
AK/Team	Pre-Approval Letter - To Agent	Email Mortgage Coach
AK	Update Mortgage Coach with Property Data and Updated Rates	
AK	Pull property profile & parcel and add to Shared Drive	
SW/KH	Call Listing Agent After Offer Submitted and Send Email Recapping Convo	Email & Bomb Bomb

IN CONTRACT

HT	Add Client to AT Active Contact Info, Crucial Dates, Etc by EOB for new contracts	AT
VM	Check AT Active to make sure data is accurate	AT
AK	Move Client in Pre-approval tab to In Contract	AT
SW/KH	New Contract - To Listing Agent - Ask via FaceTime - will you give me a chance to prove myself to you?	Email & Bomb Bomb
VM	Mutual Contract Congrats Note - To Buyers Agent	Handwrytten
VM	Mutual Contract Congrats Note - To Seller	Handwrytten
VM	Add new Listing Agent and new Selling Agent to Master Tab	AT
SALESFORCE	Introduction to Email Borrowers, Agents	Salesforce
AK	Set-up title & escrow; pull fee quote online/via email; save to shared drive	
AK	Print PSA, organize by addendum, scan & save to SD (Form 17 saved separately)	
AK	Send Stacia Rates and Pricing	
AK	Mortgage Coach for client consideration and ask them to lock use template	Email
HT/AK	Lock in loan; apply PV (if needed)	
AK	Send PenFed membership application, if PenFed is investor	Email Email & DocuSign
AK	Issue Disclosures	
AK	File to Set-up Same Day as Disclosures - Finalize file summary notes for Chelsea Same Day as Disclosures	
SALESFORCE	Submitted to Processing Email clients, Agents	Email Salesforce
AK	Sends What's Next document same day as disclosures	Email
AK	Save What's Next Document to SD	
AK	Order condo cert; if applicable	
AK	Order appraisal once loan disclosures issued	
SALESFORCE	Appraisal Ordered Clients, Agents	Salesforce
VM	Once in mutual (after inspection) Send Book for Kids, Toy for Pets and Moving Package for Singles	USPS
VM	Send/give new listing agents Team Weishaar WHY booklet	Issuu/Email
SW/KH	SW calls both sides every Friday 10am - 12pm	Telephone
Chelsea	Review within 24 hours after disclosures issued	
Chelsea	Send team needs list	Email & Telephone
HT	Reach out and provide needs list with 24 hour return deadline & Phone Call First then Email	
HT	Needs list updated to client every two days until complete	Email & Telephone
HT	Request EOI from client no later than day 5 in contract. Ask for referral to Letisha OR Lauren HO6 Insurance	Email Email
Zoe	Order EOI within 24 hours	
Chelsea	File submitted to Underwriting within 24 hours of receipt	

SALESFORCE	Email sent submitted UW, client, agents	Salesforce
Chelsea	Share any client travel dates from What's Next Doc with escrow	Email
SALESFORCE	Appraisal Received	Salesforce
HT	Appraisal to Stacia for value and as is	
SW/KH	Appraisal Received at Value; SW to call buyer & listing side to share value	
VM	Appraisal Received at Value - To Client (after SW gives approval)	Email
VM	Appraisal Received at Value - To Agents (after SW gives approval)	Email
HT	Save Appraisal to Shared Drive; update Appraisal sent dates in LOS	
SW/KH	SW calls client after initial approval	
HT	Sends notice of conditional UW approval to both buyer agent; cc team	Email
HT	Sends notice of updated UW approval to both client; cc team & Chelsea	Email
HT	Sends notice of updated UW approval to both client, agents & escrow; cc team	Email
HT	Send Automated Email to Selling Agent to Confirm Any Credits or Addendums	Email
HT	CD issued - verify accuracy send to clients; cc team - DONE WITHIN 2 hours of receipt	
HT	Text client to sign CD	
SALESFORCE	CD Sent to client, agents	Salesforce
SALESFORCE	Docs sent to escrow email	Email
TBD	Email to borrower - request if travel plans in next 2 weeks	
	HT ask for signing appointment and gets copy of SS and schedules meeting with SW to review. IS	
HT	SIGNING APPOINTMENT ADDED TO SF?	Email
SW/KH	SW reviews SS with client; asks for feedback for process improvement	Email
HT	Email to Escrow - Wire Received? Funds Released to Record?	Email
SALESFORCE	Agents loan funded and recorded; client, agents	
HT	Post Funding - To Client	Email
HT	Post Funding - To Agents	Email
VM	Send Zillow review to client via SW email address	Email
VM	Send Zillow review to agents (both sides) and submit review on their behalf via SW email address	Email
VM	Once closed, verify accuracy in AT on "YEAR" Master Tab	
HT	Update client tab in AT; move file in shared drive to closed	
SALESFORCE	Change client to closed in CRM add to closed drip campaign	
VM	Funding Congrats note - To Selling/Listing Agent immediately post closing	Handwrytten
VM	Make \$10 donation to HS4H per file closing - for client, selling agent and listing agent	

EVERYTHING ELSE

VM	Pillow - all Purchases	
HT/AK	Cancel Files	
	First payment info sent by 15th of month for prior month's closing; request if buyer has any	
SALESFORCE	questions/issues we can help with cc team	
TEAM	Customer Service: payments, insurance, etc.	
Alyssa/VM	Add client and agent on FB, INSTAGRAM, LINKED IN, invite to like Facebook page	
		LiveBinders.com & Physical Binder
VM	Post Close Binder - 30 days post close send client packet - appraisal, settlement statement	
SW/VM	30 day calls	SlyBroadcast
VM	180 day reviews	Handwrytten

SW/KH	Annual Review Package	AT & SF & Calendly & Email & Bomb Bomb
SW/VM	Annual review calls	SlyBroadcast Calendly & Bomb Bomb & Text
SW/KH	3 agents meetings per week - new and existing	
SW/KH	1 alternative referral source meeting per month, i.e. accountant, financial advisor, divorce attorney, other LO with no HELOC, real estate attorney	
SW/KH	3 past client meetings a month	
SW/VM	Design Christmas Cards	
VM	Mail christmas cards	
VM	You Broke Up With Me - note to Client - send via SW email	Handwrytten