

Ad Process

Ads run on Google

Potential Client Clicks Ad

Potential client is then taken to a specific landing page with a form and is given three options to choose from:

Client clicks "Talk to an LO"

Entered into a potential client workflow for the assigned LO. An email and text is immediately sent to the LO to contact the potential client. An email and text is also sent to the potential client to let them know that they will be contacted shortly by a loan officer.

Potential Client gets added to the workflow and fills out application form at some point in the workflow process.

Potential Client gets added to the workflow but opts out.

Potential Client makes their way through the whole workflow without filling out an app.

Client clicks "Soft Credit Pull"

They are then redirected to a landing page created by iSoftPull where they will fill out their information for a SOFT credit pull. Their soft credit pull information will be added to their SF contact profile. This information will help determine what workflow they are put into based on their possible credit score.

Credit score is <500: client is informed of their low credit score from the soft pull and they are then added to credit education workflow

Credit score is >500: client is informed of their credit score from the soft pull and they are then added to a short workflow informing them of their score and connecting them with an LO.

Client doesn't fill out the form so they are then sent to a short workflow reminding them to fill out the soft credit pull form.

Client clicks "Ready to Apply"

Potential client is redirected to the SimpleNexus apply link for the designated LO.

Potential Client fills out the mortgage application for the specific LO and begins the loan process.

Potential Client does not end up filling out the application so they are then sent to a short workflow that reminds them to fill out the link and then contacts the LO to call the potential borrower.

NOTE: Data from form creates new "paid lead" contact in surefire once form is submitted, no matter their choice.