

SureFire CRM Campaign Handbook

Interactive Purchase Prospect Campaign 6- Month

Prospects Campaign

Handbook Created: July 29, 2015

 Top Of Mind Networks



Caitlin Clark
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Marketing Coordinator
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20 Events Timeline

	Type	Event Name	Addressed To	Timing	Year
1	Phone Call	Introductory Phone Call		1 Days Out	
2	Email	Thanks for Your Time	Primary and Secondary Contact	2 Days Out	
3	Email	Getting to Know You	Primary and Secondary Contact	4 Days Out	
4	Email	Video Riddle: The Power of Preapproval	Primary and Secondary Contact	14 Days Out	
5	Email	Surefire Games Mortgage Planning Ahead	Primary and Secondary Contact	24 Days Out	
6	Email	Video Riddle: Unusable Downpayment	Primary and Secondary Contact	34 Days Out	
7	Phone Call	Courtesy Call: Market Conditions and Rate Forecast		44 Days Out	
8	Email	Video Riddle: Should You Play The Waiting Game?	Primary and Secondary Contact	54 Days Out	
9	Email	Housing Payment Calculator - Interactive Message	Primary and Secondary Contact	64 Days Out	
10	Email	Surefire Games Mortgage Do or Don't	Primary and Secondary Contact	74 Days Out	
11	Phone Call	Courtesy Call: Market Conditions and Rate Forecast		84 Days Out	
12	Email	Video Riddle: Can You Spot the Home Buyer's Mistake?	Primary and Secondary Contact	94 Days Out	
13	Email	Prospect Game: Question Every Homebuyer Should Ask	Primary and Secondary Contact	104 Days Out	
14	Email	Video Riddle: Inspection Question	Primary and Secondary Contact	114 Days Out	
15	Phone Call	Courtesy Call: Market Conditions and Rate Forecast		124 Days Out	
16	Email	Video Riddle: Can you solve the case of unintended consequences?	Primary and Secondary Contact	134 Days Out	
17	Email	Prospect Game: Lock or Float	Primary and Secondary Contact	144 Days Out	
18	Phone Call	Courtesy Call: Market Conditions and Rate Forecast		154 Days Out	
19	Email	Video Riddle: Case of the Quick Credit Catastrophe	Primary and Secondary Contact	168 Days Out	
20	Todo Task	Disposition the Prospect		180 Days Out	



Hi Elizabeth,

I just wanted to thank you in advance for your time, consideration, and for allowing me the opportunity to earn your business.

I'm looking forward to continuing our dialogue, Elizabeth. In the meantime, please don't hesitate to contact me by phone or email if I can be of service.

Oh, by the way, a few days from now I'm going to email over a very brief survey. It will take less than a minute to fill it out and I'd be grateful if you'd please be on the lookout for it. Thanks again!

Sincerely,

Caitlin Clark

Inlanta Mortgage, Inc.

Marketing Coordinator-NMLS #1016

(262) 439-4268

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Inlanta Mortgage, Inc. NMLS# 1016. Programs subject to change. This is not an offer of credit or a commitment to lend. Loans are subject to credit approval. Not all loan programs are available in every state. Cash reserves may be required for some loans.



This email was sent as part of my effort to maintain our relationship and keep you well informed of market conditions. It could be interpreted as a commercial message. If you would like to stop receiving these emails, you may [click here to unsubscribe at any time](#).
Inlanta Mortgage, Inc. - 611 N Barker Road Suite 200, Brookfield, WI 53045



Hi Elizabeth,

As we begin working together, I'd like to learn a little bit more about what is important to you. In that spirit, would you please spend a few moments filling out the online survey below.

Thanks in advance Elizabeth and have a great day.

[\$SURVEY: Getting to Know You{232}\$]

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Hi Elizabeth,

“Power” is not a word you typically associate with obtaining financing for a home purchase, but it should be. Your power source: pre-approval.

Want to see an example of how getting a pre-approval from a trusted mortgage company could work for you? Watch the short video and enjoy.



Thanks for entrusting my team and me with your business, Elizabeth. I'll be in touch again very soon with more great information about the mortgage process.

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Hi Elizabeth,

Who says getting a mortgage can't be fun? Try our quick game, and you may pick up some tips for making your mortgage process easier.



If you have questions for me, please reach out. I'll be happy to help.

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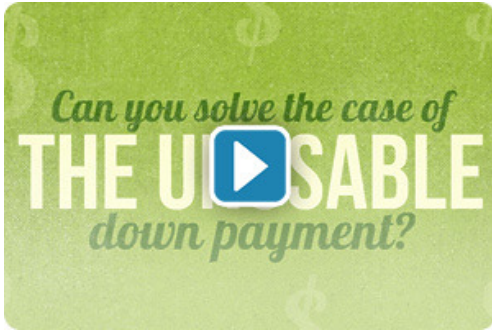
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Hi Elizabeth,

I'm sure you're working hard to save up for your home purchase. Did you know in the eyes of an underwriter, all money is not created equal?

See if you can solve this riddle to discover what kinds of funds may not work at the closing table...and what you can do about it.



As always, if you have any questions or would like more details, please reach out. I'm happy to help.

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Hi Elizabeth,

One thing I love about the mortgage business is that numbers never lie.

Yet, so many prospective home buyers I meet end up making critical judgment errors based on faulty assumptions and faulty math. I want to help you avoid these traps.

Theory: Waiting to purchase a home in hopes of a drop in purchase price is always a good idea.

Reality: Sometimes this strategy pays off. Many times, it financially backfires.

So, how do you know which approach is correct? For starters, let's see if you can correctly solve the scenario in the video below. The lesson you learn might save you thousands over the long run.



IMPORTANT NOTE: There are many financial and philosophical variables that go into determining a good time to buy. Which approach may work for you? I highly recommend we spend some time reviewing your long term objectives and set out a planned strategy for your situation.

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Elizabeth,

Maybe you've seen what a principal and interest payment would be for homes in your price range, but do you wonder what your full monthly payment might be? We have a fun widget to help you estimate. Just click on the link below.



If you have questions or want to explore opportunities after following the link, please email or call. I'll be glad to help.

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Hi Elizabeth,

When it comes to securing your mortgage, do you know which actions to take and which to avoid? Try our quick online game to find out.



Please remember, if you find yourself in a mortgage quandary and need to "phone a friend," I'm here to help.

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Hi Elizabeth,

Today most financial services companies use a credit scoring model called FICO to determine if you qualify for their programs, as well as what to charge you for these products and services. In addition to your mortgage, your credit score can affect what you pay for your credit cards, auto insurance, and a host of other products. While FICO's scoring model is widely accepted, it is also proprietary and often confusing.

Are you ready to solve another riddle? The video below will take you through a very common scenario in the world of credit. Please see if you can predict the effect of a simple decision on a credit score.



If you have questions about your credit score and how your actions may affect it, please feel free to give me a call. I'll be happy to discuss it with you.

I promise to keep the information coming, Elizabeth. Thanks again for the opportunity to earn your business!

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Hi Elizabeth,

Realistically speaking, how long do you plan on living in the home you're hoping to purchase?

More times than not, my clients tell me they're planning to live in their home forever. However, most real estate professionals I've spoken to on this topic suggest that the typical family's home needs change approximately every five to seven years. This statistic might surprise you—it certainly surprised me!

But it brings to light a highly critical point:

If you are reasonably certain you'll be in your home less than 10 years, we ought to look at a wider range of mortgage program options. For example, we may want to compare the costs between a 10-year adjustable rate mortgage (ARM) and the tried-and-true 30-year fixed mortgage.

Of course, this analysis requires us to balance risk with reward—and turn over a few extra stones. But if you'd do both of us a big favor, Elizabeth, **I'd like to ask that you give this question considerable thought** as we continue down the path of home ownership together.

Here's a game you can play to learn more about ARMs today:



As always, thanks for allowing me the opportunity to serve you. Please don't hesitate to reply to this email if you have any questions or if I can be of any help.

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Hi Elizabeth,

One common requirement involved in the mortgage process is the ordering of a third party appraisal. This fee is a standard closing cost most all borrowers pay, regardless of lender.

Of course, most of us want to limit our out-of-pocket costs as much as possible when purchasing a big-ticket item such as a home. It stands to reason a common question I'm asked is:

If I'm Already Paying for an Appraisal, Do I Still Need a Home Inspection?

I have another riddle to help answer this question. I'm positive you'll solve it easily. Click below if you want to give it a try.



Thanks for playing along, Elizabeth. I hope you're enjoying the riddles and learning a little, too. As always, if I can answer any questions about the home buying process for you, please reach out.

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Hi Elizabeth,

Today's lesson is about unintended consequences and the importance of having an experienced and knowledgeable mortgage professional by your side as you navigate through what can sometimes be a confusing process.



Elizabeth, please know that it's my sincere pleasure to work with you. I hope you're seeing a lot of value thus far and look forward to connecting again soon.

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Hi Elizabeth!

The interest rate on all mortgage loans is locked in at some point prior to closing. Please try our quick game to learn more about locking and floating:



Elizabeth, I hope you're finding the information I'm providing to be fun and informative. If you know someone else who may benefit from these messages, feel free to share.

As always, if you have any questions about financing a home, please reach out. We're here to help.

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Hi Elizabeth,

Today, I'd like to help you avoid another hidden pitfall many aspiring home buyers fall into.

Hopefully, you've narrowed your home search down to a few exciting options and are beginning to envision the future in your new home. Inevitably, I find that some pending home buyers get caught up in all that excitement and make some choices that later come back to haunt them. Yes, that's right. It's time to solve another mystery.



Elizabeth, please know that it's my sincere pleasure to serve you. I hope you enjoy these fun little mysteries and put the lessons they teach into play!

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