



Lead Purchase Vacation/2nd Home

The *lead nurture* type of journey in Total Expert is used to nurture a contact from your first introduction to that person until they complete a transaction (or they are removed from the journey for another reason). These journeys use a mixture of emails and tasks to help you communicate with each contact on the journey. This journey is good for contacts who are current homeowners interested in purchasing a vacation or second home.

Available Lead Vacation/2nd Home Journey Options

- Lead Purchase Vacation/2nd Home

How Do You Get This Journey Ready?

- Define a success path (the “off ramp”).
 - Set the loan status to the first step when the contact applies or pre-qualifies.
- Define group names for the journey.
 - The group Lead Purchase Vacation/2nd Home Journey is pre-defined for this journey. Feel free to adjust the name of this group.
 - As a best practice, we recommend using groups for lead nurture journeys, because they are easy to use with triggers.
- Review the content of each email template to ensure that the messages you send out align with your organization’s messaging.
 - Preview the email templates included in each journey. You can play a video by clicking the video thumbnail.
- Review the tasks that are defined throughout the journey.
 - If you would like to keep the tasks, update the task template associated with each one.
 - If you do not want to use these tasks, feel free to delete them.
- Review the user notifications.
 - If you would like to keep the user notifications, update them after the Email Link Clicked and Email Opened triggers.
 - If you do not want to use these user notifications, feel free to delete them.
- Update journey statuses to reflect what you would like to see in reporting.
 - The default journey status names follow the formula `name of the Journey + loan status`.
 - Journey statuses are used to see how many contacts have made it through each phase of the journey.
- Review timer delays.
 - The times between emails vary. Feel free to adjust these intervals as you see fit.
 - By default, this journey sends 9 emails over a span of 4 months.