



# Pre-Qualified Journey

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 have been pre-qualified and are not yet on an in-process campaign.

## Available Pre-Qualified Journey Options

- Pre-Qualified Journey

## How Do You Get These Journeys Ready?

- Define how contacts start journey (the “on-ramp”).
  - Specify the Loan Updated trigger to include your specific LOS data point that indicates a contact has been pre-qualified.
  - You can also use a Loan Status Change or Loan Created trigger.
- Define a success path (the “off ramp”).
  - Set the loan status to the status that indicates the contact is no longer pre-qualified and they have taken the next steps in the loan process.
- Define a failure path (the “off ramp”).
  - Set the loan status to any adverse statuses that should remove a contact from the journey (denied or cancelled are common).
- Define group names for the journey.
  - The groups names are pre-defined. Feel free to adjust the names of these groups.
- 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.
- 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 or replace them with Send User Notification actions.
- 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, the Pre-Qualified journeys send 6 emails over a span of 6 weeks.