

# Listing Insights

# What are Listing Insights?

- A Listing Insight is an alert that is added to a client contact record in Total Expert.
- It notifies you when a client has listed their property within the last **SEVEN** days.



# How to Leverage Listing Insights

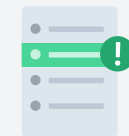
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Activity Stream



Contact Record



Focused View

# 1. Activity Stream

The screenshot displays the TotalExpert dashboard interface. On the left is a dark blue sidebar with navigation icons and labels: Dashboard, Leads & Contacts, Co-Marketing Partners, Loans, Activity Stream, Tasks, Campaigns, Journeys, Lead Capture Apps, Print Marketing, Web Marketing, Email Marketing, and Reporting. The main header area includes the TotalExpert logo, a search bar labeled "Search Contacts...", and user profile information for Katie. Below the header, the "Dashboard" section has tabs for Overview, Loan Pipeline, and Funded Loans. The Overview tab is active, showing eight metric cards arranged in two rows:

- New Contacts**: 0 past 24 hours
- Birthdays**: 3 this week
- Loan Pipeline**: \$4.7m
- Expiring Pre-Approvals**: 2 next 30 days
- Open Tasks**: 18
- Emails Opened**: 0 past 24 hours
- Closed Loan Volume YTD**: \$2.9m
- Co-Marketing Partners**: 2

Below the metric cards is a "Loan Volume (Funded Date)" chart. It features a stacked bar chart comparing Conventional (blue) and FHA (red) loan volumes. The y-axis is labeled "Loan Volume" and ranges from \$0M to \$1.8M. The legend indicates "Grouped" (circles) and "Stacked" (dots). Two bars are visible, both showing a stack of Conventional and FHA loans.

On the right side of the dashboard is a "Recent Activity" section titled "Last 30 days". It contains a "View Activity Stream" button and lists recent events:

- Listing Insight**: By Nancy Asman. A listing insight was created and will expire on 08/01/2022. Email: email@email.com. Actioned by Katie Phillips on 02/01/2020 3:30pm.
- Email Opened - Sam Osberg**: Congrats on listing your home! Email: training20@totalexpert.com Cell Phone: 763-441-5646. Actioned on 01/31/2020 3:17pm.
- Email Delivered - James Jackson**: Congrats on listing your home! Email: training24@totalexpert.com Cell Phone: 612-854-8643. Actioned on 01/31/2020 3:16pm.



## > Tasks

# 3. Focused View

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Dashboard

Leads & Contacts

Focused View

Contacts

Groups

Settings

Archived Contacts

Co-Marketing Partners

Loans

Activity Stream

Tasks

Campaigns

Journeys

Lead Capture Apps

Print Marketing

Web Marketing

Email Marketing

Reporting

TotalExpert

Search Contacts...

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Katie

Focused View

Standard Custom

Listing Insights

These contacts have an active Listing Insight

Sorted By: Last Contacted Date

Steve Collins	Referred By: ---	Cell Phone: (595) 456-4894	Last Contacted: ---	Contact Created: 06/26/2019	Task Due (Overdue): 2/3/20 - 10:39 am	Actions	Notes & Follow-up
Sam Osberg	Referred By: ---	Cell Phone: (763) 441-5646	Last Contacted: 01/31/2020	Contact Created: 06/26/2019	Task Due (Overdue): 2/3/20 - 10:39 am	Actions	Notes & Follow-up
James Jackson	Referred By: ---	Cell Phone: (612) 854-8643	Last Contacted: 01/31/2020	Contact Created: 06/26/2019	Task Due (Overdue): 2/3/20 - 10:39 am	Actions	Notes & Follow-up

New Leads

Contacts with a "New" status created in the last day and added to "Leads" group

Sorted By: Last Contacted Date

Refinance Opportunities

Borrowers with a most recent closed loan with a rate of 5% or greater

Sorted By: Last Contacted Date

Pre-Approval Expirations

Borrowers whose pre-approvals will expire in the next 7 days

Sorted By: Last Contacted Date

Pre-Approvals

Borrowers who are pre-approved but have not found a property

Sorted By: Last Contacted Date

# Take Action!

## Example call Script

"Hi [contact first name],

It's [your first name], loan officer with [mortgage company name]. I wanted to reconnect with you and remind you that my team and I are always available to help you work through any changes to your housing needs either now or in the future.

*Have your housing needs changed recently? Is there anything I can help you with right now?*

If I can ever help answer any of your questions or provide you with resources, please don't hesitate to reach out."