Objective

This coaching configuration introduces a **structured, repeatable workflow process** for select AnnieMac users, based on **a proven coaching methodology**. The goal is to **test and refine** this approach – adding automation to the process to increase efficiency.

Goals

- Use Shape CRM to create a consistent follow-up process for relationship management and relationship building; automating tracking and reporting

- Make the process scalable across branches

- **Daily time blocks** for focused activities such as Realtor check-ins and pipeline updates

- **Challenge:** Loan Originators call contacts using their cell phones and log a "Note" for each contact in Shape CRM. This removes the contact from the list, leaving only those who need outreach. Contacts reappear after a set time, like 7 days, for additional follow-up to nurture and build the relationship.

What's Been Implemented in Shape CRM

CRM Prioritized Views

We've implemented **five prioritized views**, structured around **weekly workflows** to help users stay on top of key follow-ups. These views follow **the coaching framework** and integrate with **locked prioritized column views** to maintain consistency.

- Five filtered lists include:

Prioritized View

Monday: Realtor Check-Ins

Tuesday: Pipeline Updates

Wednesday: Birthdays & Anniversaries

Wednesday: Strike Rate

Thursday: PreQuals
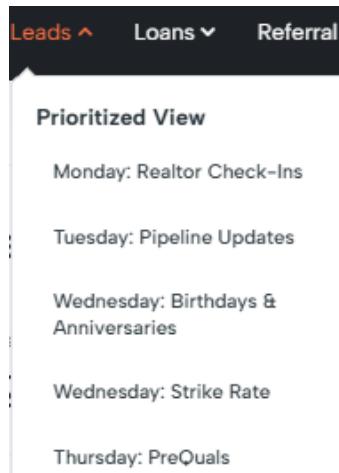
Standardized Note Types for Tracking

To improve tracking and reporting, we've standardized **note types** across all systems. These updates ensure coaching outcomes are **measurable** and improve visibility through the **Note Type Report:**

📌 View the Note Type Report (**managers / admins only**)

Updated Note Types

Upon calling your contacts, log the appropriate **Note Type** based on the outcome of the call / outreach.

Manage Notes Types

- General
- Phone Call
- LVM / Sent Video
- Meaningful Conversation
- Next Steps Identified
- Information Sent
- Transaction Secured
- Strike Rate
- Important
- Tasks & Events
- Connected on Socials

Monday: Realtor Check-Ins

This view prioritizes follow-ups with **Realtor referral partners**, including both active and prospective partners. Using statuses to categorize contacts helps organize outreach and enables more targeted, effective conversations.

- Use **Partner Status** to indicate your relationship with the contact.
  - New Prospect > Attempting Contact > Meeting Scheduled > Building Relationship > Active Referrer
- Use **Classification Status** to indicate the contact's referral volume potential
  - **Whales** (48+ buyer side transactions a year)
  - **Tuna** (12-47 buyer side transactions a year)
  - **Tilapia** (less than 12 buyer side transaction a year)

How It Works

- Fill in the **Partner Status** and **Classification Status** on your Referral Partner records – and the contact will appear on the Monday Realtor Check-ins list.

- Since many users call from personal cell phones instead of Shape's built-in telephony, outreach is tracked using the **"Last Note Date & Time"** option.

- When a note is added to a referral partner's record, they are **removed from the view for seven days** to prevent excessive follow-ups.

Prioritization Rules

Only referral partners classified as **Whale** or **Tuna** appear in the following statuses. Partners without a Classification Status are excluded.
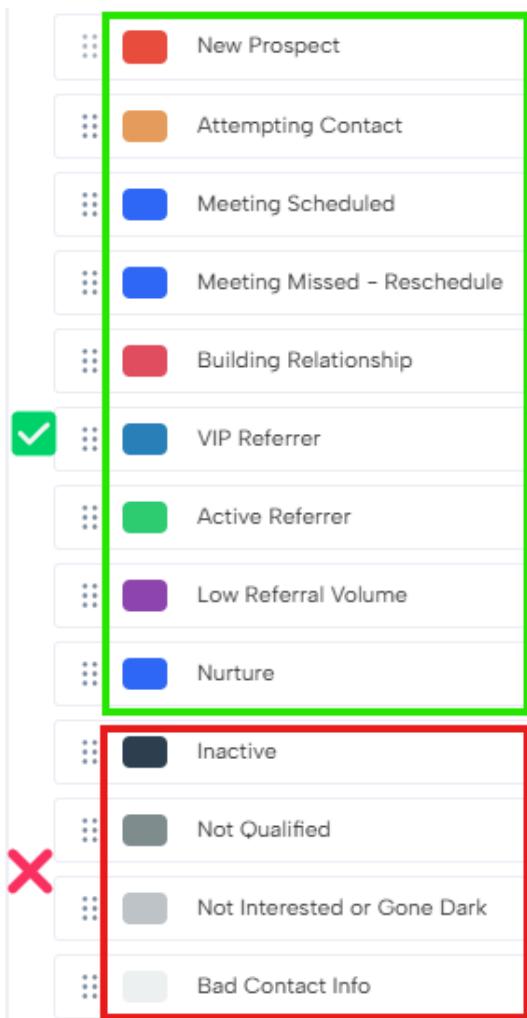
The last sub-category in this prioritized view contains referral partners classified as **Tilapia**. After you log a Note on a Tilapia contact, it will not reappear on the list for **30 days**.

- Tilapia

Make Your Calls, Then Log a Note

This workflow ensures **consistent follow-ups with high-value referral partners** while avoiding redundant outreach.

1. Click the NOTE icon.
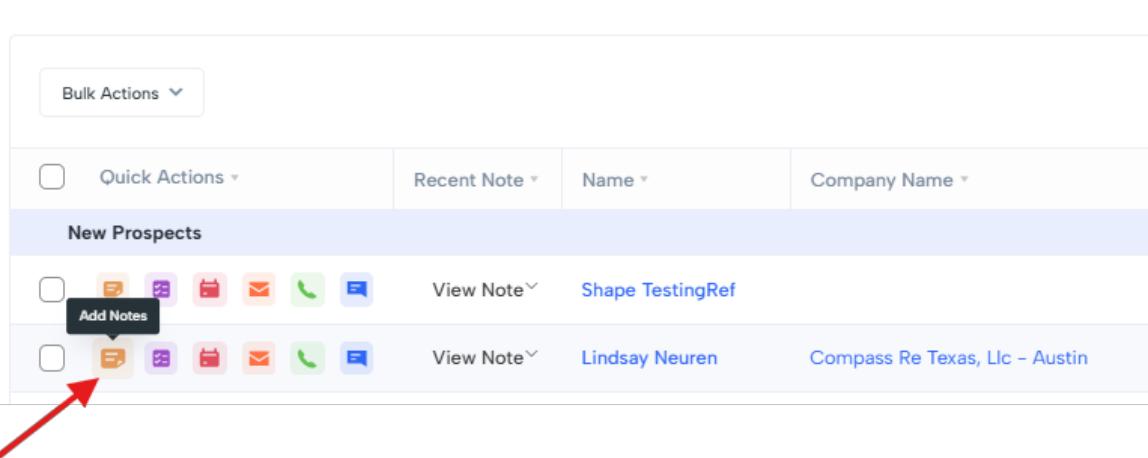
2. Select a NOTE TYPE
3. Add text in the note (otherwise the workflow will not work properly)
4. Click CREATE NOTE button to save.

Expected Outcomes (Note Types to use) for New Prospect / Attempting Contact / Building Relationship / Low Referral Volume

- Phone Call
- Connected on Socials
- LVM / Sent Video – Left Voicemail or Send a CoVideo message
- Information Sent
- Meaningful Conversation
- Transaction Secured – if the realtor sends you your first referral

Expected Outcomes (Note Types to use) for <u>Active</u> / <u>VIP Referrer</u> Partners

- Phone Call
- Meaningful Conversation

Tuesday: Pipeline Updates

This view ensures **timely follow-ups** with **borrowers and their buying/selling agents** for loans currently in process.

How It Works

- For **purchase loans**, borrowers drop from the view for **7 days** after a note is added.

- For **construction loans**, borrowers drop from the view for **30 days** after a note is added due to longer processing timelines.

- Outreach is tracked using **"Last Note Date & Time,"** since many users call from personal cell phones.

Prioritization Rules

🏡 **Purchase Loans**

Only borrowers with a **loan purpose of "Purchase"** are included. Those with a note in the past 7 days are excluded. This will allow you provide weekly updates to active borrowers and their buyer and seller agents during the progression of the loan through the pipeline.

Prioritized List Rules

::	Disclosures
::	Submitted / Processing
::	Conditional Approval
::	Approval
::	Clear To Close
::	Docs

Expected Outcomes (Note Types to use):

- Meaningful conversation

- Phone call

- Left Voicemail/Video message

- General - use if emailed/texted an update

Wednesday: Strike Rate

This view ensures a consistent follow-up with your database of Past Clients & Funded borrowers.

Prioritization Rules

We have prioritized the borrowers by their <u>Interest Rate</u> of their past closed loan, focusing on the highest interest rates first. This list be extremely valuable when rates drop as it is already pre-organized for who to reach out to.

⠿ Rate >= 7%
⠿ Rate around 6%
⠿ Rate around 5%
⠿ Rate around 4%
⠿ Rate around 3%
⠿ Rate 0-3%

Expected Outcomes (Note Type to use)

- Strike Rate

Enter Borrower's Strike Rate (Target Rate)

Once the Strike Rate is determined with your borrower, enter it into their record. Go to the tab **Lead Details** then tab **Loan & Property.** Scroll down to find the field **Target Rate**.

Wednesday: Birthdays & Anniversaries

This view ensures followup with your database of Past Clients & Funded borrowers – which provides you with a reason to call – it is their birthday or it is their loan anniversary!

Prioritized List Rules

⋮⋮ Recently Past Borrower Birthdays

⋮⋮ Upcoming Borrower Birthdays

⋮⋮ Upcoming Co-Borrower Birthdays

⋮⋮ Recently Past Co-Borrower Birthdays

⋮⋮ 1 Year Loan Anniversary

⋮⋮ 2 Year Anniversary

⋮⋮ 3 Year Anniversary

⋮⋮ 4 Year and Above Loan Anniversaries

How It Works

If a note is added to a borrower's record, they are removed from the list.

Expected Outcomes (Note Type to use)

- Meaningful Conversation
- LVM / Sent CoVideo

**Bonus Tip: Record a generic birthday co-video (leaving out names) that you can use over and over. For example:

> *"Hey there! It's [Your Name] from [Company Name] here, and I just wanted to take a quick moment to say... **Happy Birthday**! Sending you my best wishes for a fantastic year ahead. Enjoy your special day, and if there's ever anything I can do for you, don't hesitate to reach out. Happy Birthday again!"*

Thursday: PreQual Follow-Ups

This view ensures **timely follow-ups** with borrowers and their buying agents for loans in the **pre-qualification stage**.

How It Works

- If a note is added to a borrower's record, they are **removed from the view for 14 days** to prevent excessive follow-ups.

- Since many users call from personal cell phones instead of Shape's built-in telephony, outreach is tracked using the **"Last Note Date & Time"** option.

Prioritization Rules

Only borrowers classified in the following statuses appear in the view. Borrowers with a note in the past **14 days** are excluded.

Prioritized List Rules

:: Pre-Approval Requested

:: Pre-Approved

:: Pre-Approval Expired

:: Credit Pulled Last 6 Months

Expected Outcomes (Note Type to use)

- Phone Call
- LVM / Sent CoVideo
- Meaningful Conversation
- Next Steps Identified