

8:30 AM — Pipeline Control (15–20 mins)

Goal: Prioritize leads and prepare for the day.

Steps: 1. Open your pipeline. 2. Identify hot buyers, refinances, stalled deals. 3. Generate **Loan Estimate (LE)** for hot or refinance leads. 4. Optionally generate **Buyer Estimate (BE)** for agent sharing.

Sample Script:

Borrower: "Can you give me an idea of my cash to close?" You: "Absolutely! Here's a **Loan Estimate** via TitleCapture with monthly payments, escrow, and total cash to close. You can adjust it live if needed."

10:00 AM — Agent Activation (30 mins)

Goal: Engage agents and provide tools for their clients.

Steps: 1. Text top 2–3 agents. 2. Share **Buyer Estimate (BE)** links. 3. Highlight live adjustment capabilities.

Sample Script:

"Hey [Agent Name], here's a **Buyer Estimate** link from TitleCapture. You can use it live during showings for any property your clients consider."

11:30 AM — Lead Conversion (1 hour)

Goal: Convert leads quickly before they shop elsewhere.

Steps (Loan Estimate LE): 1. Enter property address → auto-fills title fees & taxes. 2. Enter loan details: amount, term, rate. 3. Enter borrower info: down payment, credit score tier. 4. Review optional fees/escrow. 5. Hit **Calculate** → generate full LE. 6. Share live link or PDF.

Sample Script:

"I've run a full **Loan Estimate** for your scenario. Here's a link with monthly payments, escrow, and total cash to close. Adjust numbers live if needed."



1:30 PM — Refinance Conversion (1 hour)

Goal: Convert refinance leads efficiently.

Steps: 1. Identify clients with high-rate loans. 2. Generate **Loan Estimate (LE)** for refinance. 3. Input current mortgage vs new rate. 4. Adjust escrow and closing costs if necessary. 5. Hit **Calculate** → get instant break-even analysis.

Sample Script:

"Here's a **Loan Estimate** comparing your current mortgage to a 6% refinance. You can see monthly savings and break-even timing."



3:30 PM — Objection Handling (45 mins)

Goal: Address cost comparison objections.

Steps: 1. Identify clients with competing quotes. 2. Generate **side-by-side LE or BE**.

Sample Script:

"No problem! Here's a **Buyer Estimate** side-by-side showing line-by-line fees and total cash to close. You can see exactly where numbers differ."



4:30 PM — Follow-Up / Engagement (30 mins)

Goal: Keep leads engaged and updated.

Steps: 1. Send updated **Loan or Buyer Estimates** if numbers changed.

Sample Script:

"Hey [Name], I updated your **Buyer Estimate** based on the latest property details. Take a look and let me know if anything stands out."

6:00 PM — Evening Deal-Winning Hour (30 mins)

Goal: Capture borrowers reviewing at home.

Steps: 1. Send **Loan or Buyer Estimates** with adjustable fields. 2. Highlight interactive features.

Sample Script:

"Most people review this in the evening—here's a **Loan Estimate** you can view and adjust live with your spouse. Shows monthly payments, total cash to close, and escrow."

Weekly Agent Power Move (Friday Morning)

Goal: Become the go-to lender for agents.

Steps: 1. Send pre-filled **Buyer Estimate** templates for weekend showings. 2. Agents can instantly generate live quotes.

Sample Script:

"Hey [Agent Name], here's a **Buyer Estimate** link you can use this weekend with your clients. Live, adjustable, and shows total cash to close."

Notes

- **Loan Estimate (LE):** Lender-facing, TRID compliant.
 - **Buyer Estimate (BE):** Agent/buyer-facing, interactive.
 - Use **LE** for pre-approval, refinancing, formal estimates.
 - Use **BE** to engage agents and buyers instantly.
 - Live links are preferred over PDFs for faster interaction.
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End of Playbook