



Process of Excellence

- **Introduction to Intuitive Loans**
- **Application (Overview of the Loan Process)**
- **Post-Application Loan Comparison Email**
- **After-Appointment Follow-up and “Thank You” Call**
- **Approval or Status Call**
- **Condition Confirmation Email**
- **Week 1 Update – Call/Email**
- **Week 2 Update – Call/Email**
- **Week 3 Update – Call/Email**
- **Week 4 Update – Call/Email**
- **Pre-Closing Call (Clear for Docs)**
- **Attend the Closing (When Possible)**
- **After Closing Thank You/Survey Letter**
- **Bi-Monthly Client Service Call**

14-Point

Contact

System