

BONZO! STARTERS

LEAD TO LOAN JOURNEY – PREBUILT PIPELINE + CAMPAIGNS

The Lead to Loan Journey Starter gives loan officers a complete, done-for-you setup inside Bonzo. It includes a fully mapped pipeline and prewritten messaging campaigns that fire automatically at each stage of the borrower's journey.

WHAT'S INCLUDED

- ✓ Prebuilt Pipeline with 9 key stages
- ✓ Automated Campaigns (Email + SMS) tied to each stage
- ✓ Smart logic that moves leads automatically
- ✓ Customizable content, merge tags, video, and timing
- ✓ Ready-to-use on Day 1 — perfect for busy loan officers

The screenshot shows a pipeline titled "Pipeline: Lead To Loan Journey" with a toggle switch. Below the title is the subtitle "Organize your sales process". A search bar is present with the placeholder text "Search by name, email or phone". The pipeline consists of three stages:

- New Lead** (green dot): 0 people, 1 events. Campaigns: S1: New Lead. Amount: \$0.00.
- Engaging** (blue dot): 0 people, 1 events. Campaigns: S2: Application Needed. Amount: \$0.00.
- Initial Application Journey** (yellow dot): 0 people, 1 events. Campaigns: S3: Loan App Follow Up. Amount: \$0.00.

Each stage has a plus sign below it, indicating it can be added to the pipeline.

CONTENT OVERVIEW:

 LEAD TO LOAN JOURNEY <small>STARTER!</small>	Attached Campaigns	Purpose	Automations
New Lead	 <small>STARTER!</small>	Start contact with new prospects	Auto-starts. No reply in 11 days → moves to Cold Lead.
Engaging	 <small>STARTER!</small>	Lead responded, but hasn't applied.	No activity in 20 days → moves to Cold Lead.
Initial App Journey	 <small>STARTER!</small>	Prospects who started but didn't finish their application.	Moves to next stage Cold Lead if not dispositioned within 20 days.
Pre-approved	 <small>STARTER!</small>	Client is shopping for a home.	Auto-starts when moved in.
In Process	*None by default but can be edited*	For active loans in underwriting or closing.	*None by default but can be edited.*
Cold Lead	 <small>STARTER!</small>	Softer outreach for unresponsive leads.	Moves to Dead Lead if not dispositioned within 185 days.
Save Opportunity	 <small>STARTER!</small>	Attempts to re-engage prospects who've gone quiet.	Moves to Cold Lead if not dispositioned within 50 days.
Dead Lead	 <small>STARTER!</small>	Final outreach attempts before archiving.	*None by default but can be edited.*
Past Clients	 <small>STARTER!</small>	Long-term nurturing for funded clients. <small>*Refi Campaign included</small>	*None by default but can be edited.*

WHAT'S NEXT BEFORE TOGGLING ON?

Lead to Loan Journey



Follow these simple steps before setting live:

- **Review the Campaigns messaging and Settings:** Tweak message copy to fit your voice before launching and verify the settings are set correctly.
- **Add Your Leads:** Past clients → “Past Clients” New prospects → “New Lead” or “Engaging”
- **Turn Campaigns On:** They’re off by default. Once reviewed, toggle them on.
- **Customize as Needed:** Use bonus Campaigns like Refi, Renter, or Long-Term Nurture from your campaign library.

The screenshot displays a campaign configuration interface with three main sections:

- Days:** A vertical list of days from Day 1 to Day 5. Day 1 is highlighted with a pink border and contains 3 events. Day 2 has 1 event, Day 3 has 3 events, Day 4 has 1 event, and Day 5 has 2 events.
- Events:** A section for configuring events for Day 1. It shows two event types:
 - Email:** Configured for Day 0. Delay relative to the previous event is 0h 0m. Date created: 12:00 PM 4 Jun 2025. Date updated: 2:29 PM 5 Jun 2025.
 - Sms:** Configured for Day 0. Delay relative to the previous event is 0h 0m. Date created: 12:00 PM 4 Jun 2025. Date updated: 2:26 PM 5 Jun 2025.
- SMS event:** A detailed view of the SMS event configuration. It includes an event name (Day 0: SMS 1), a message preview, and a 'Generate (All) (-10 tokens)' button. The message preview shows dynamic fields: "Hi **Person first name**, My name is **Assignee name** with **My company name**. I wanted to reach out quickly to introduce myself officially and give you my contact information." Metadata at the bottom indicates 2 segments, ~6 tokens, and 171 characters.

Bonzo Starters brings structure, automation, and proven messaging into one seamless workflow—so you can focus less on setup and more on conversations that convert.