



canada mortgage brokers inc.

CMB Approval Centre – MHCD Activity Flow Chart

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CFL

Contact – Followup CMB Fair Mortgage Rate Estimate, Closing date, Rate to beat, potential for ABC

Followup – create a followup for application, approval, or potential closing

Log – input all contact in PipeDrive, mark next actions required.

Activity Flow Chart

PipeLines found in PipeDrive

- > Nurture – Active Campaign, CMB Pre-Qualification Program
- > Lead in – CMB Contacted by Victor Simone with Estimate
- > **Fair Mortgage Rate / Followup – Agents CFL**
- > Floify / Application – Agents Floify, Expert, Docs
- > CMB Deal Review – Agents submit to Victor for submission
- > Approval – Agents ensure deal is approved
- > Signup – Agents prepare signup and submit to Victor for approval prior to presenting
- > Lender Fulfillment Conditions
- > Instructed / Funded