

BROKING WORKFLOW REVIEW

Leads Pipeline (Lead Board)	
Workflow Stage	Assignee/Role
New Opportunity	
Attempted Contact	
Initial Call Held	
Pre-qualification	
Docs Requested	
Docs Reviewed	
Research	
Servicing	
Lender Selection Shortlist	
Prepare Loan Proposal	
Loan Proposal Presented	
Client Accepted > Handover to Deals Board	
On Hold	
Opportunity Lost	

Deals Pipeline (Deal Board)	
Workflow Stage	Assignee/Role
Outstanding Supporting Docs	
Prepare For Submission	
App Docs With Client	
Signed App Docs Returned	
Application Lodged	
Lender Acknowledgment	
Assessment in Progress	
AIP Issued	
AIP to Full Conversion	
Conditional Approval / MIR's	
Conditions / MIR's With Client	
Conditions / MIR's with Lender	
Formal Approval	
Mortgage Docs issued	
Mortgage Docs Returned	
Ready To Settle	
Settment Booked	
Settled	
Post Settlnent 6 Week Check In	
Lost / Declined	

Customer Care Pipeline (Client Care Board)	
Workflow Stage	Assignee/Role
6 Month Re-Pricing	
Annual Review	
18 Month Equity Review	
Fixed Rate Review	
Interest Only Rate Review	
Review In Progress	
Variation	
Complete	
No Change	
Birthday Message or Email	