

The Forge | Castle & Cooke Mtg

New Agent Prospecting Campaign

Melissa Fairbourn - Castle & Cooke Mortgage
Handbook Created: August 4, 2022

WELCOME

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Castle & Cooke
MORTGAGE, LLC®



Melissa Fairbourn

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5 Workflow Actions Pipeline

Types indicated with * have samples included in this handbook.

Type	Timing	Event Details	For
1 Add Tag	Immediately	New-Agent-Prospect	Contact
2 Send Email*	5 minutes	01. Let's work together	Contact
3 Send Email*	3 days	02. Grow your business with these tools	Contact
4 Send Email*	8 days	03. First Home, Next Home, Best Home (and Refi!)	Contact
5 Send Email*	12 days	04. Let's Talk Marketing	Contact

Email Sample: 01. Let's work together

From : Melissa Fairbourn (mfairbourn@castlecookemortgage.com)

To : Fantastic Recipient

Subject : Let's work together



Hello Mary,

Trying to go it alone as a real estate professional can be daunting. But it doesn't have to be that way! When you work with me at Castle & Cooke Mortgage, you get access to tools, technologies, and loan programs that add value to your business and help you attract more clients.

Castle & Cooke Mortgage has come to be known for lightning-fast processing, 24-hour underwriting, constant communication with borrowers and agents, and keeping the loan process as streamlined as possible.

I'd like to schedule some time to sit down with you so we can take a look at all the awesome tools and resources available to agents. Let's help one another grow!

Thanks,

Melissa Fairbourn

MARKETING SYSTEMS ADMINISTRATOR NMLS ID# 12345



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[CCM:Mobile App](#)

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Castle & Cooke Mortgage, LLC, complies with Section 8 of RESPA and does not offer anything of value such as marketing services or defrayed business costs in exchange for referrals or for the expectation of referrals.

Castle & Cooke Mortgage, LLC, cannot guarantee closing times.

This email was sent as part of my effort to maintain our relationship and keep you well informed of market conditions.

Click here to change your email preferences. [Unsubscribe here.](#)

13751 South Wadsworth Park Drive Suite 101, Draper, UT 84020

Email Sample: 02. Grow your business with these tools

From : Melissa Fairbourn (mfairbourn@castlecookemortgage.com)

To : Fantastic Recipient

Subject : Grow your business with these tools



Hey Mary,

As a real estate agent, you can help your business grow by **wowing your clients** and **keeping in touch** at every stage of the homebuying process. I'm here to offer amazing loan programs to qualified borrowers, but that's not all. When you work with us, you will have access to:

- A home search app powered by Mobility RE
- Property-specific websites for listings
- Marketing support for open houses
- Co-branded marketing collateral that is both engaging and informative
- Homebuyer seminars
- Quick closings with 24-hour underwriting turn times
- Automated email campaigns to borrowers
- Business development and sales coaching for **you** and **your team**

Reach out anytime to access these tools and learn more about how we can serve homebuyers together!

Melissa Fairbourn

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Email Sample: 03. First Home, Next Home, Best Home (and Refi!)

From : Melissa Fairbourn (mfairbourn@castlecookemortgage.com)

To : Fantastic Recipient

Subject : First Home, Next Home, Best Home (and Refi!)



Hello Mary,

We're proud to offer a full suite of loan programs available to borrowers in every stage of life.

From zero-down or no MI programs for first-time homebuyers to excellent options for investors and vacation home enthusiasts, we have access to many different local loan programs and grants.

It's all designed to build better futures by keeping the benefits of homeownership within reach.

From Cottage to Castle, we're with you at every step.


Melissa Fairbourn

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Email Sample: 04. Let's Talk Marketing

From : Melissa Fairbourn (mfairbourn@castlecookemortgage.com)

To : Fantastic Recipient

Subject : Mary, Let's Talk Marketing



Hello Mary,

Is your brokerage only doing the bare minimum to support your marketing needs? Are prospective buyers getting distracted by other listings on your IDX and local MLS websites?

We have a solution you don't want to miss! Our marketing platform contains a vast library of marketing materials designed to educate and inform your prospective buyers and turn them into clients.

The centerpiece of our marketing platform is the single property website feature. Together, you and I can create a slick, stunning website that features your listing, open house and property flyers, and even loan scenarios.

Can't find what you're looking for? Let's work together to turn your ideas into something epic—and since we share a proportionate amount of the cost, your marketing dollars can go **even further**.

Ready to get started?


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Workflow Handbook Disclaimer

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