

Customer communication and status updates

This workflow automatically notifies borrowers of loan application status changes and milestone updates, reducing manual communication tasks and keeping customers informed throughout the mortgage process.

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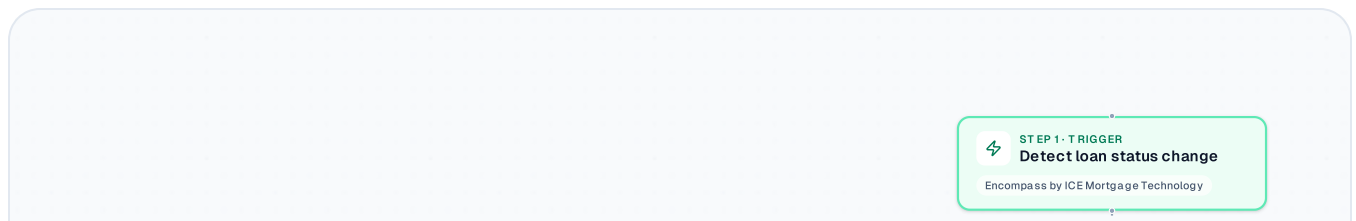
WORKFLOW TRIGGER

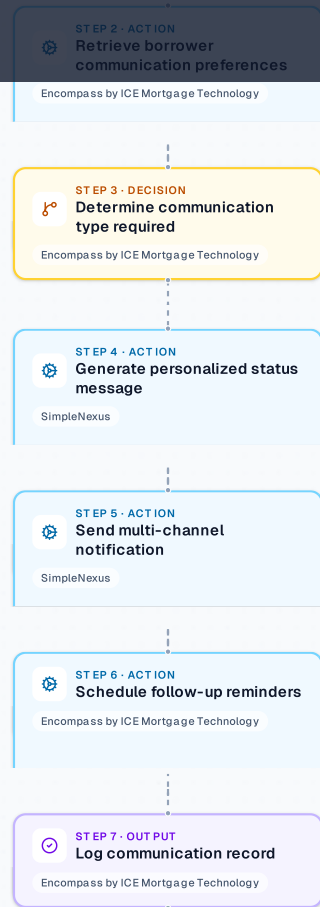


Loan status changes in the mortgage processing system (application received, underwriting started, approval/denial, closing scheduled).

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Detect loan status change

Monitor Encompass for any status updates on active loan applications. System captures the new status, loan details, and borrower contact

2 ACTION**Retrieve borrower communication preferences**

Pull borrower's preferred communication method (email, SMS, phone) and contact details from the loan origination system. Gather any special instructions or restrictions.

Encompass by ICE Mortgage Technology

SimpleNexus

3 DECISION**Determine communication type required**

Evaluate the status change to decide if this requires immediate notification, standard update, or document request communication. Branch workflow based on urgency level.

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4 ACTION**Generate personalized status message**

Create customized communication content based on loan status, borrower name, and next steps required. Include relevant documents, timelines, and action items.

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5 ACTION**Send multi-channel notification**

Deliver the status update via borrower's preferred communication method (email, SMS, or mobile app push notification). Log communication in borrower's file.

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6

 ACTION

Schedule follow-up reminders

Set automated reminders for loan officer if borrower response or action is required. Create calendar entries for upcoming milestones or deadlines.

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7

 OUT PUT

Log communication record

Document all communications in the borrower's loan file for compliance and audit purposes. Generate summary report of notification delivery status.

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Outputs

- Automated borrower status notifications
- Communication delivery confirmation

- Compliance communication logs

AI Business OS



Key Metrics

- Communication response time
- Borrower satisfaction scores
- Notification delivery success rate



Tools & Integrations

- Encompass by ICE Mortgage Technology
- SimpleNexus

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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