DIAMOND CO.

Lender-Specific Signing Cheat Sheets

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# **Cut Loan Signing Time by 30% – Free Lender-Ready Signing Checklist & Email Capture Kit**

## **1. Product Specifications**
**Format:** Downloadable PDF (8.5x11, mobile-responsive)
**Lenders Covered:** Fannie Mae, Freddie Mac, FHA, VA, USDA, Top 20 Portfolio Lenders
**Documents Included:** Note, Mortgage/Deed of Trust, Riders, Closing Disclosure, Title Affidavits
**Depth:** 5-page annotated guide with signature/Notary requirement matrix

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## **2. Goal & Metrics**
**Goal:** Generate **5+ qualified lender emails per 48-hour cycle** (valued at **$20 per lead**).

**Key Metrics:**
- `email_captures` (tracked via form submissions)
- `click-through_rate` (CTR) from distribution channels
- `engagement_rate` (e.g., opens, replies to follow-ups)

**Checkpoint:** 48 hours to validate initial traction (aim for **≥5 verified lender emails**).

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## **3. Kill Rule**
**Trigger:** If **2 iterations** (48-hour cycles) generate **<5 verified lender emails**, pause the experiment and:
- Re-evaluate targeting (e.g., adjust LinkedIn ad copy, refine forum posts).
- Test alternative distribution channels (e.g., Reddit, Slack communities).

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## **4. Boost Rule**
**Trigger:** If **≥25 verified lender emails** (valued at **$500+**) are generated, scale distribution efforts:
- **Paid Ads:** Run a **$50–$100 LinkedIn ad** targeting mortgage lenders.
- **Partnerships:** Collaborate with fintech platforms (e.g., send cheat sheets to their user base).
- **Content Upgrade:** Add a **bonus section** (e.g., "Top 5 Loan Signing Pitfalls to Avoid").

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## **5. Clone Rule**
**Trigger:** If **>100 verified lender emails** (valued at **$2,000+**) are generated, replicate the model for:
- **Borrower-Specific Cheat Sheets** (e.g., "How to Speed Up Your Loan Approval").
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- **Other Verticals:** Real estate agents, title companies, or fintech startups.

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6. Distribution Plan

Channel: Owned Website (`lendersigningcheatsheets.com`)
Content:
- **Free Downloadable PDF** (e.g., "Loan Signing Checklist for Lenders").
- **Email Collection Form** (e.g., "Get the cheat sheet + weekly loan tips").

Promotion:
- **LinkedIn:**
  - Post: *"Struggling with loan signing delays? Here's how lenders close deals faster."*
  - Target: Mortgage lenders, fintech founders, and loan officers.
- **Fintech Forums:**
  - Post in: Mortgage Professionals Association (MPA), FinSMEs, and Reddit's r/Mortgage.
  - Example: *"Free cheat sheet: 7 Ways to Reduce Loan Signing Time."*
- **Paid Ads (Optional):**
  - **$50 LinkedIn Ad:** Target lenders in the U.S. (age 30–60, job titles: "Loan Officer," "Mortgage Lender").
  - **$20 Reddit Ad:** Post in r/Mortgage with a link to the cheat sheet.

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7. Maintenance Plan

Regulatory Compliance
- **Quarterly Review:** Ensure compliance with GDPR, CCPA, and state privacy laws.
- **Template:** Use a [GDPR Compliance Checklist](https://example.com/gdpr-checklist).

Content Updates
- **Refresh Within 48 Hours** of major industry changes (e.g., new FHA loan rules).
- **Example Update:** Add a section on "Compliance Changes in 2024."

Email List Growth
- **Weekly Check:**
  - Send a **follow-up email** (e.g., "Did you find the cheat sheet helpful?").
  - Re-engage inactive leads with a **personalized note** (e.g., "We miss you! Here's a quick tip...").

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8. Next Steps (Actionable Checklist)

Phase 1: Launch (Day 1–3)
- [ ] Build landing page with form + download link.
- [ ] Post on LinkedIn (target 50+ lenders).
- [ ] Share in fintech forums (MPA, FinSMEs).

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- [ ] Track CTR and email captures.

### **Phase 2: Monitor (Day 4–5)**
- [ ] Apply **Kill Rule** if <5 verified lender emails.
- [ ] Apply **Boost Rule** if ≥25 verified lender emails.
- [ ] Send follow-up emails to captured leads.

### **Phase 3: Scale (Day 6+)**
- [ ] Run **$50 LinkedIn ad** if needed.
- [ ] Test partnerships (e.g., send cheat sheets to fintech platforms).
- [ ] Apply **Clone Rule** if ≥100 verified lender emails.

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### **9. Sample Cheat Sheet Template**
**Title:** *Loan Signing Checklist for Lenders*

1. **Pre-Signing:**
   - [ ] Confirm borrower's identity (ID, SSN).
   - [ ] Verify employment/income (W-2s, pay stubs).
   - [ ] Review credit report (pull from Experian).

2. **Signing Day:**
   - [ ] Have all required documents (closing disclosure, promissory note).
   - [ ] Ensure notary is available.
   - [ ] Set a 1-hour buffer for delays.

3. **Post-Signing:**
   - [ ] Send thank-you email with next steps.
   - [ ] Schedule follow-up call in 30 days.

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### **10. Downloadable Assets**
- **Cheat Sheet Template:** [Download PDF](https://example.com/cheatsheet.pdf)
- **Email Capture Form:**
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<form action="https://example.com/submit"; method="POST">

<input type="text" name="name" placeholder="Full Name" required>

<input type="text" name="company" placeholder="Lender Name" required>

<input type="email" name="email" placeholder="Work Email" required>

<input type="tel" name="phone" placeholder="Phone (optional)">

<label>

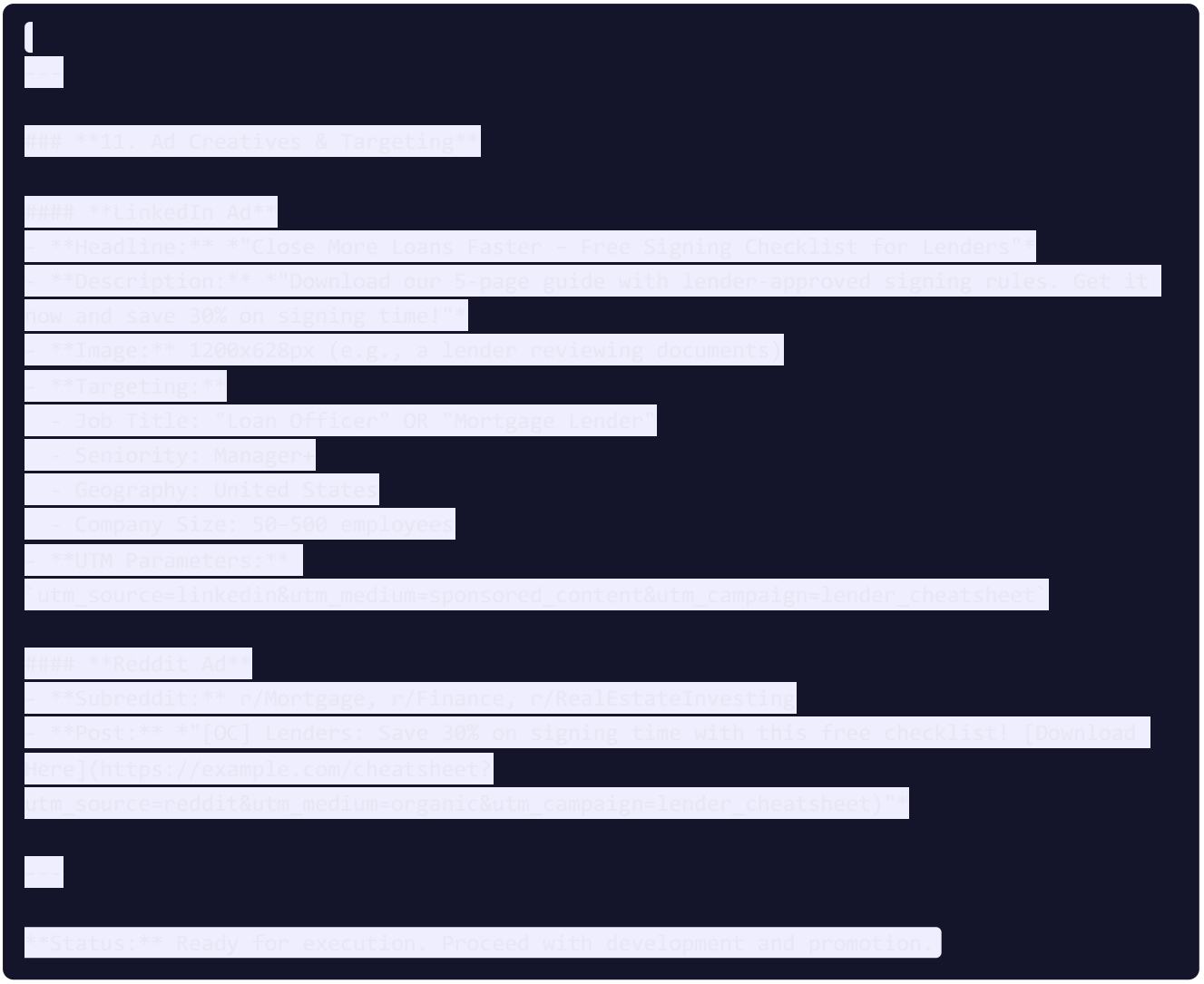
<input type="checkbox" name="consent" required>

By submitting, I agree to receive the cheat sheet and occasional loan-industry tips. I can unsubscribe at any time. View Privacy Policy.

</label>

<button type="submit">Get the Cheat Sheet</button>

</form>



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### **11. Ad Creatives & Targeting**

#### **LinkedIn Ad**
- **Headline:** *"Close More Loans Faster – Free Signing Checklist for Lenders"*
- **Description:** *"Download our 5-page guide with lender-approved signing rules. Get it now and save 30% on signing time!"*
- **Image:** 1200x628px (e.g., a lender reviewing documents)
- **Targeting:**
  - Job Title: "Loan Officer" OR "Mortgage Lender"
  - Seniority: Manager+
  - Geography: United States
  - Company Size: 50–500 employees
- **UTM Parameters:**
  `utm_source=linkedin&utm_medium=sponsored_content&utm_campaign=lender_cheatsheet`

#### **Reddit Ad**
- **Subreddits:** r/Mortgage, r/Finance, r/RealEstateInvesting
- **Post:** *"[OC] Lenders: Save 30% on signing time with this free checklist! [Download here](https://example.com/cheatsheet?utm_source=reddit&utm_medium=organic&utm_campaign=lender_cheatsheet)"*

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**Status:** Ready for execution. Proceed with development and promotion.
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