

EXPERIENCE.COM

Reviews that create the future
of your brand reputation



Experience.com is a centralized review platform



FEEDBACK

OPINION

REVIEW

COMMENT

How your customers FEEL about their mortgage experience means a LOT to others when they research companies to work with!

We are far more interested in creating value in the relationship than in closing a loan for our company.

We want to hear back from our homebuyers as well as our referral partners to build our online reputation!

NEO
Powered by Luminate Home Loans
NMLS# 15095

Mid-Process Campaign

Sent to the Consumer at
"sent to processing"
milestone

*If you do not want this
email survey to go out,
please ensure that you
let Eddie know so he can
opt your branch out.



Mid-Process Survey Email



EXCITED FOR YOU!

Serving you best is the goal of our team every day. Would you let us know how we are doing?



Hello eddie,

Now that your loan has been sent to Processing, we would love your feedback on your experience has been thus far with NEO Home Loans!

Leave Feedback

Or, copy and paste this link: https://surveys.experience.com/survey/client?key=p52SLpjFYQ_HM8nmFA2r0PBolCYnsuPo9JJK5KXWRM=

Sincerely,
Amberlee Merz
NEO Powered by Luminare Home Loans

The email was sent to planbs4@gmail.com. You received this email because you engaged with an Experience.com customer. If you have any questions, concerns, or require clarifications regarding this correspondence, or to unsubscribe please click [here](#).

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[Privacy Policy](#)



Mid-Process Survey SMS

Hello Nikki, this is Amberlee Merz. Would you please spend 30 seconds to let us know how our team is doing? Your feedback is important to us and greatly appreciated!
<https://p.xprn.co/15c95f> Reply STOP to unsubscribe

Mid-Process Survey Questions

1. Have we done a good job determining your needs up front in this process?



2. Has our team returned your calls and emails promptly, and has our team updated you throughout the loan process?



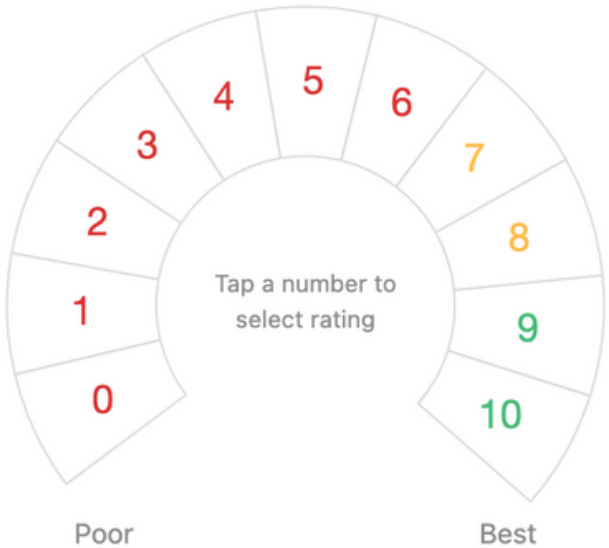
3. Has our team been courteous, professional, and kind?



5. If you answered any of the questions with a 9 or less, please let us know what we could have done to make it a 10, and how we can improve to make the experience exceptional moving forward.

Type something here...

4. Please select the overall score that describes your experience so far.



Example View of Survey Questions



Mid-Process - Cond. Approval



Amberlee Merz

Branch Manager & Mortgage Advisor

1. Have we done a good job determining your needs up front in this process?



Poor

Best

Next →

Mid-Process Survey Completed Follow-up Email



THANKS!

Your feedback makes us better!

Hello Nikki,

Thank you so much for taking the time to tell us about your experience with NEO Home Loans. We hope you will tell the people you care about what a difference working with us made for you.

We appreciate you!

Sincerely,

Amberlee Merz

NEO Powered by Luminate Home Loans

Do you know of a professional that could use the services of Experience.com? Tell them to visit experience.com for more information.

**Loan Closed
Survey**

**Sent to
borrower at
CTC**



THANK YOU!

You are likely busy packing,
but can we borrow one
minute of your time?



Hello Eddie,

Thank you so much for choosing NEO Home Loans for your lending needs. We consider you part of the NEO family and look forward to working you again in the future.

We rely upon your feedback, so if you would take 60 seconds to let us know if we served you well, it would mean a lot to us.

[Leave Feedback](#)

Or, copy and paste this link: https://surveys.experience.com/survey/client?key=SfJlg7DJHAUliG247GzYnVHalx_EuhL5l37rt7gVwio=

Sincerely,
Amberlee Merz
Branch Manager & Mortgage Advisor
Neo Home Loans

Please note that your first name, last initial, and response will be publicly posted on my Experience.com profile and may be syndicated to other social media platforms.

Loan Closed Survey Email



Loan Closed Survey SMS

Hello, this is Amberlee Merz. I hope I provided excellent service. Would you please spend 30 seconds to provide a review on my performance? Your feedback is important to me. Thank you for your time.
<https://p.xprn.co/94df5a> Reply
STOP to unsubscribe

Loan Closed Survey Questions

1. Please rate the level of SERVICE and SUPPORT you received from our team.



2. Please rate the level of ADVICE and GUIDANCE you received from our team.



3. Please rate the level of COMMUNICATION you received from our team.



4. Does someone on our team deserve special recognition for their efforts?

Type something here...


How would you rate your overall experience?

☐ Great

☐ OK


☐ Unpleasant

Example View of Survey Questions








NEO
Powered by Lendmate Home Loans

How Did We Do?



Amberlee Merz
Branch Manager & Mortgage Advisor

1. Please rate the level of SERVICE and SUPPORT you received from your Loan Team.



PoorAwesome

Next →

Loan Closed Survey Completed



How Did We Do?



Amberlee Merz

Branch Manager & Mortgage Advisor



Thank you so much for taking this survey. We depend on support from customers like you. Would you mind posting a review on Google or Zillow?



Write a review on Zillow

Loan Closed Survey Completed Follow-up Email



THANKS!

Your feedback makes us better!

Hello Nikki,

Thank you so much for taking the time to tell us about your experience with NEO Home Loans. We hope you will tell the people you care about what a difference working with us made for you.

We appreciate you!

Sincerely,

Amberlee Merz

NEO Powered by Luminate Home Loans

Do you know of a professional that could use the services of [Experience.com](#)?
Tell them to visit [experience.com](#) for more information.

Survey Completed Followup Email

- Negative Experience



Dear Eddie,

Thank you for completing our survey. We are sorry that your recent transaction with us was less than ideal. We work hard to make sure every customer has a positive interaction. Your comments have been forwarded to senior management for review. We take your feedback seriously and will evaluate to ensure we improve the customer experience in the future.

Sincerely,

Amberlee Merz

Branch Manager & Mortgage Advisor

Neo Home Loans

**Referral
Partner Survey**

Sent at Funding



THANK YOU
For making me part of the team!

Hello Eddie,

Helping you serve your customers is my goal and your feedback on how our team did means everything to us. Can you take 5 seconds to give us 5 stars?

You are the BEST!

[Leave Feedback](#)

Or, copy and paste this link: <https://surveys.experience.com/survey/client?key=nElKhG1l1rwl92K-wZecfPbmoovKeEZ1ijP64JwFbrk=>

Sincerely,

Amberlee Merz

Branch Manager & Mortgage Advisor

Neo Home Loans

Please note that your first name, last initial, and response will be publicly posted on my Experience.com profile and may be syndicated to other social media platforms.

Referral Partner Survey Email



Referral Partner Survey SMS

Hello, this is Amberlee Merz. I hope I provided excellent service. Would you please spend 30 seconds to provide a review on my performance? Your feedback is important to me. Thank you for your time.
<https://p.xprn.co/94df5a> Reply
STOP to unsubscribe

Referral Partner Survey Questions

1. Were you the Buyer's Agent or Seller's Agent on this transaction?

☐ Buyer's Agent

☐ Seller's Agent

3. Did we close this loan on time?

☐ Yes

☐ No

5. Would you recommend us to other real estate agents for their buyer's home financing needs?

☐ Yes

☐ No

7. How can I help your business? Let me know if I can add value for you on any of these platforms.

☐ Write me a review on Google

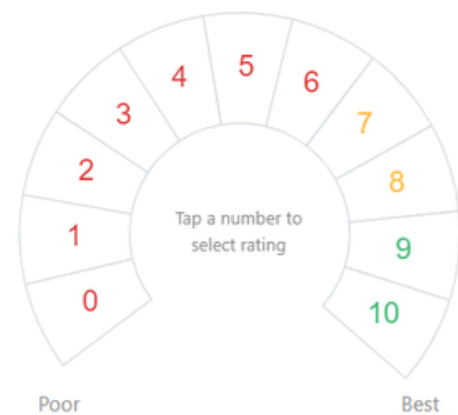
☐ Write me a review on Zillow

☐ Write me a review on Realtor.com

☐ Follow me on social media

☐ Other (Please specify)

2. How would you rate me and team's service, professionalism, and communication during the transaction?



4. Did you receive timely status updates throughout the loan process?

☐ Yes

☐ No

6. Would you be interested in one or more of the following? Check all that apply.

☐ Annual Client Events Partnerships

☐ Open House Partnerships

☐ 1st Time Homebuyer Education

☐ Lunch & Learns

☐ Single Property Sites

☐ Other (Please specify)

How would you rate your overall experience?

☐ Great

☐ OK

☐ Unpleasant

Example View of Survey Questions



How Did We Do?



Amberlee Merz

Branch Manager & Mortgage Advisor

1. Were you the Buyer's Agent or Seller's Agent on this transaction?

☐ Buyer's Agent

☒ Seller's Agent

Next →

0%

Referral Partner Survey Completed – Positive Experience



How Did We Do?



Amberlee Merz
Branch Manager & Mortgage Advisor



Thank you so much for taking this survey. We depend on support from customers like you. Would you mind posting a review on Google or Zillow?

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experience.com



Referral Partner Survey Completed Followup Email – Positive Experience



Hello Eddie,

Thank you so much for taking the time to tell us about your experience with NEO Home Loans. We look forward to working with you again.

We appreciate you!

Sincerely,
Amberlee Merz
NEO Powered by Luminate Home Loans

Do you know of a professional that could use the services of Experience.com?
Tell them to visit experience.com for more information.

Referral Partner Survey Completed – Negative Experience



How Did We Do?



Amberlee Merz

Branch Manager & Mortgage Advisor



We apologize that you had a bad experience. We hope to earn your business and trust again in the future. Also, your answers and comments will help us to improve the experience of future customers.



Dear Eddie,

Thank you for completing our survey. We are sorry that your recent transaction with us was less than ideal. We work hard to make sure every customer has a positive interaction. Your comments have been forwarded to senior management for review. We take your feedback seriously and will evaluate to ensure we improve the customer experience in the future.

Sincerely,

Amberlee Merz

Branch Manager & Mortgage Advisor

Neo Home Loans

**Survey
Completed
Followup Email -**

**Negative
Experience**

**Sent to LO &
Necco**

The background is a solid light blue color. Overlaid on this are several geometric elements: a series of parallel lines forming a grid-like pattern that recedes into the distance, creating a sense of depth; and several solid blue circles of different sizes scattered across the composition. The text 'Thank You' is centered in a bold, white, sans-serif font.

Thank You