

TAG LENDING GROUP



EMPLOYEE ONBOARDING

Tips and Guide of what you need to do!



WANT TO





Summary of Topics



Company Profile

No Tolerance Policy

Dropbox Installation and Set-up

Outlook, Calendar, and HS Profile

Outlook ADD-INS

Meeting Links

Email Signature

Creating List View

System Name

Slack-Outlook Integration

Employee Biography

Additional Information

Lending Pad (LOS) and Credit Services

Linktree Set-up

Company Profile



WHO WE ARE AND WHAT WE DO?



[View Document](#)

Dropbox Installation and Setup



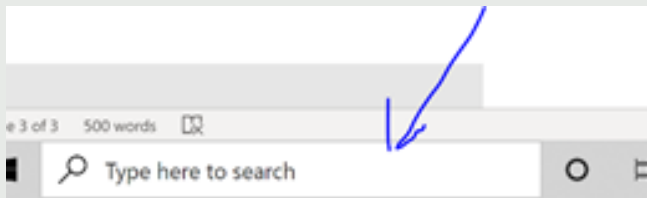
Email: TheAngelilloGroup@Gmail.com
Password: **TAGTEAMNATION**



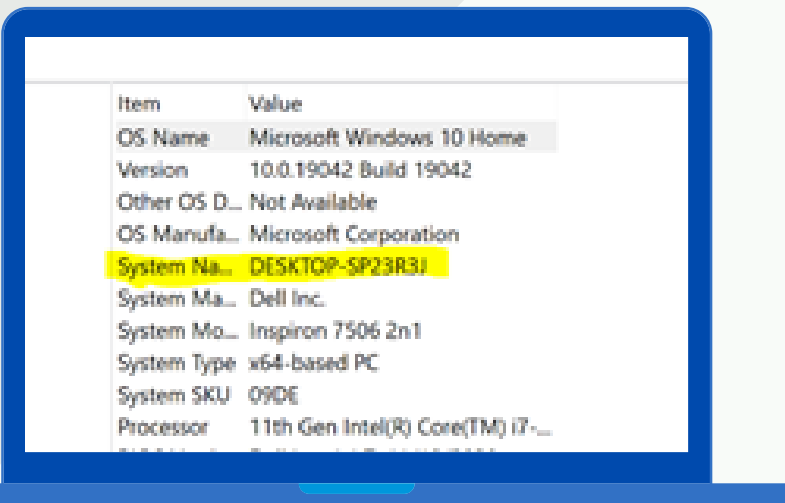
Dropbox Installation and Setup

1. Go to your “Type here to search bar”

2. Type in “System”



I need the system name



3. Please send an email/slack for the “System Name”

Elreen Baggo [TAG TEAM Sales Manager]:
ElreenTagTeamNation@gmail.com

Pearl Liddawa [TAG TEAM Head MA Manager]:
PearlTagteamnation@gmail.com

4. Download the link below

<https://www.dropbox.com/install>

User Name: TheAngelilloGroup@gmail.com

Password: TAGTEAMNATION

5. Text Anthony Angelillo 860-462-7737 for the code

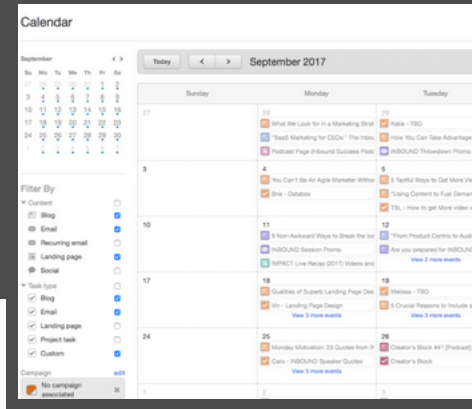
PLEASE NOTE: ONLY USE ONLINE AND DO NOT
DOWNLOAD ON YOUR HARD DRIVE!



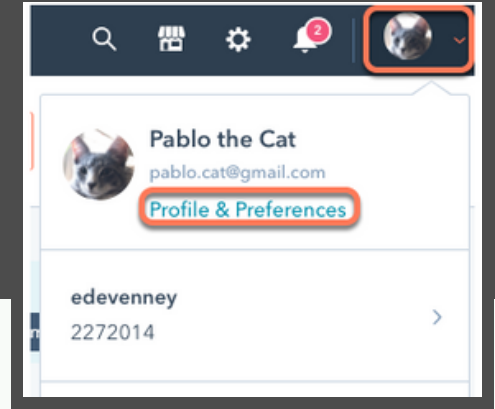
OUTLOOK, CALENDAR, AND HUBSPOT PROFILE SET-UP



OUTLOOK



CALENDAR



HUBSPOT PROFILE





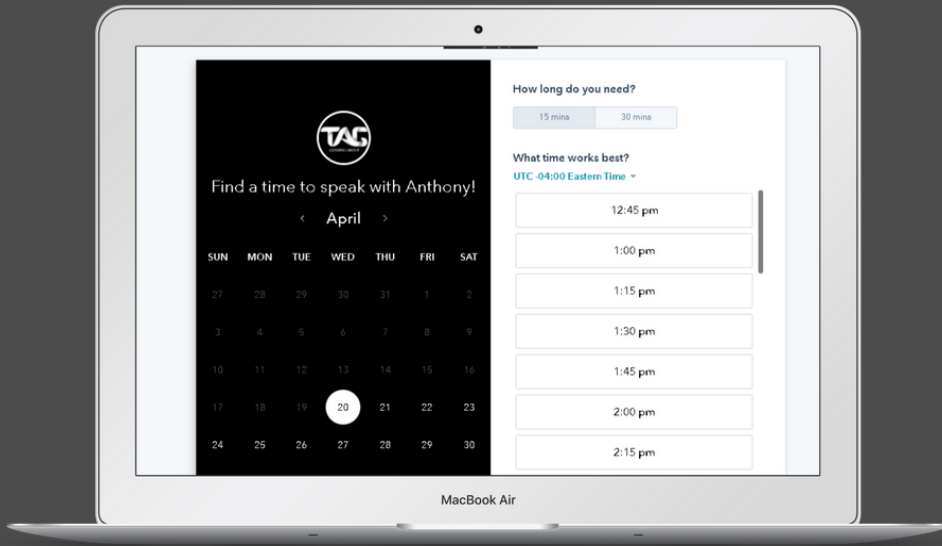
Outlook ADD-INS





Meeting Links

*We will send out the following meeting links on your outlook email, make sure to accept the following:



SALES MEETING

(9 am - Weekly every Wednesday)



SALES TRAINING

(9 am - every last Friday of the month)



MONTHLY TAG TEAM SALES RALLY!

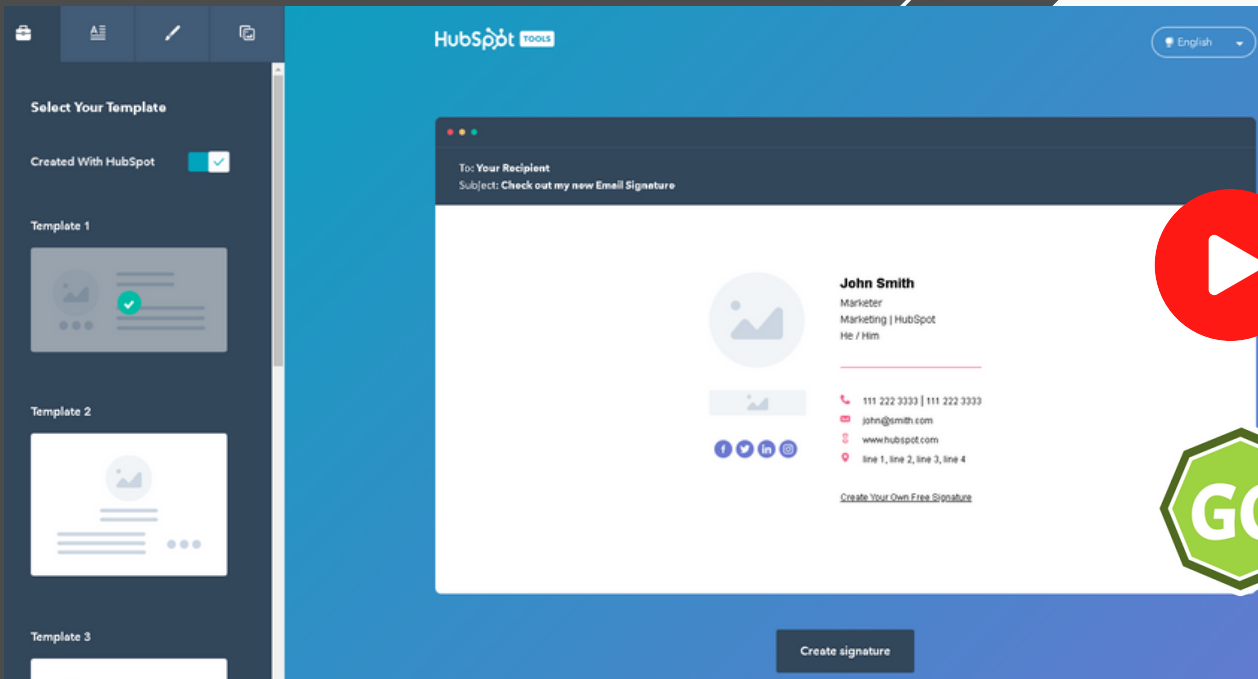
(9 am - First Monday of the Month)





Signature

Email Signature



NOTE: Please add "TM" in "Lets Tag Team This Deal!"

Let's TAG TEAM This Deal!™



Creating List View

The screenshot shows the TAG LENDING GROUP interface. At the top, there is a navigation bar with various menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, and Asset Marketplace. The 'Contacts' menu is highlighted. Below the navigation bar, the 'Contacts' section is displayed, showing '33,606 records'. There are three tabs: 'All contacts', 'My contacts', and 'Unassigned contacts'. A '+ Add view' button is highlighted in yellow. A dropdown menu is open from this button, showing a search bar and a list of views: 'Standard', 'All contacts', 'Marketing Contacts', 'My contacts' (highlighted), and 'My recently assigned contacts'. Below the dropdown, there is a search bar and a table of contacts. The table has columns for 'NAME' and 'CONTACT OWNER'. The first row shows 'jalfonso@firstam.com' with 'Unassigned' as the contact owner. The second row shows 'Daniel Sussman' with 'Robert "Bob" Migden' as the contact owner. The third row shows 'Sequoah Lloyd' with 'Valeria Escalante (ve...' as the contact owner.





System Name



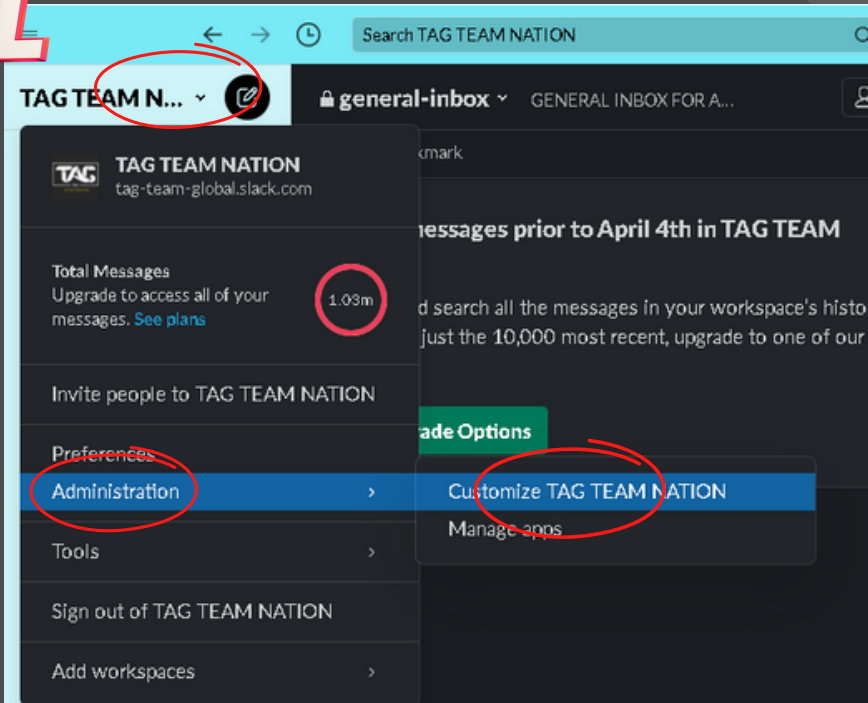
Note: Please send Marketing team [pearlsgateamnation@gmail.com] the system name of your computer



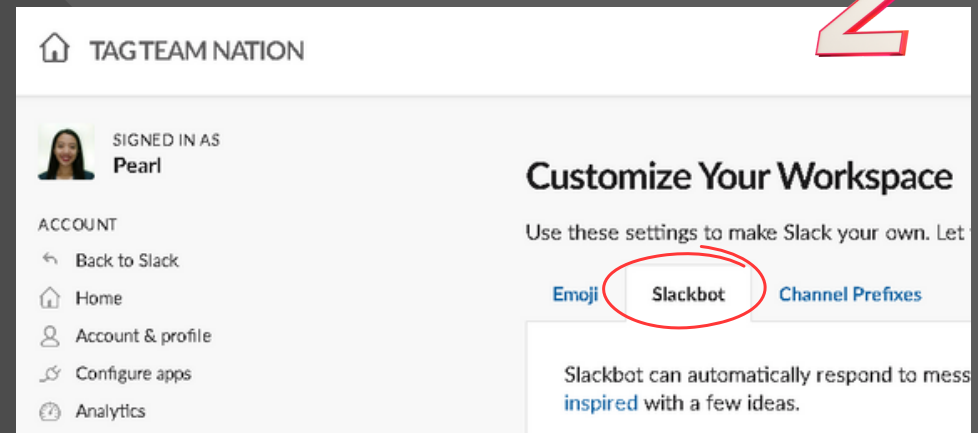
Slack-Outlook Integration

Note: All list of commands will be pinned in slack.

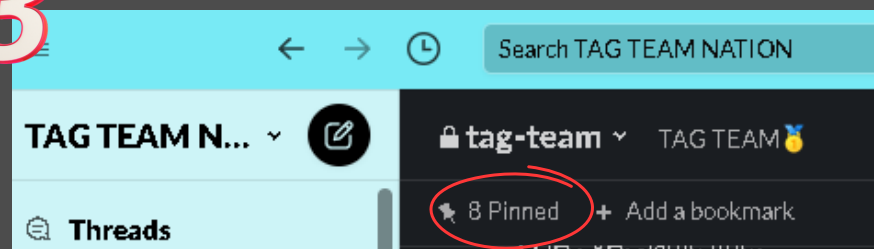
1



2



3





Slack-Outlook Integration





AFTER SETTING UP EVERYTHING, DO NOT FORGET TO DOWNLOAD **SLACK** AND **HUBSPOT** TO YOUR MOBILE PHONE.



SLACK



HUBSPOT



Employee Biography



IMPORTANT!

What TAG needs from you?

The Marketing Team will create a Landing Page that you can share with all your Borrowers and Affiliates. For the team to accomplish that and to get your page running, you will need to provide a formal **Headshot** and your **Biography** that contains:

- A short description of yourself
- What you do in the company, and
- What you can offer to your clients.



Technology Fee

• HubSpot CRM/ CMS Seat
• Private Website
• Short Forms [White label]
• Lending Pad

PERSONAL INFORMATION			
Last Name	First Name	Middle	
Address		City	State
Phone	Email address		

PROCEED TO PAYMENT



UWM - Thirsty For Loans!



MEN SHIRT



WOMEN SHIRT

Mandatory TLG Shirts



TAG Shop



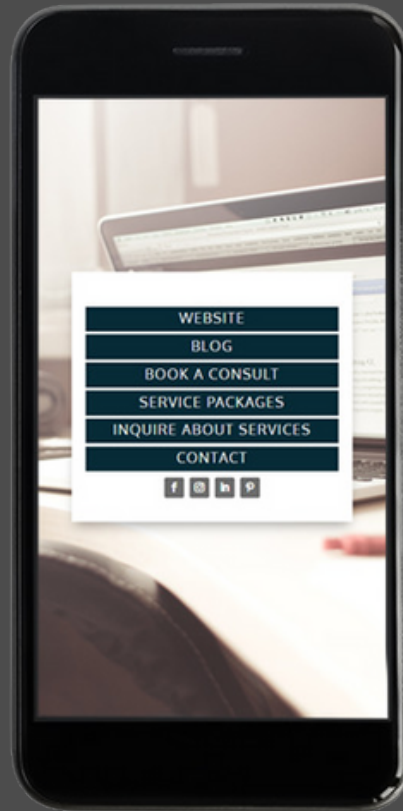
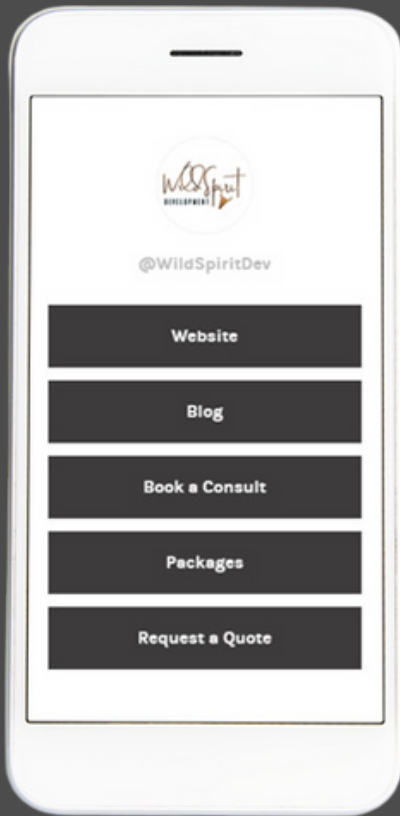
Magic Mug



SHOP NOW FOR MORE



Linktree Setup





COMPANY AND EMPLOYEE FEEDBACK FORM



[Submit Performance Review](#)



LinkedIn Profile



Download Banner [Here](#)

Bio should look like the one above:

- Mortgage Loan Originator NMLS ID 1516097 | TAG Lending Group, LLC NMLS ID 2329372 | Miami Shores, Florida

→ include your own designated area



Don't forget to do your Voicemail. Check these [Training Audio](#) under Week 1

WEEK 1

WELCOME PACKAGE



DAILY OR WEEKLY PLANNERS



DESIGNS



CHEAT SHEETS



TRAINING AUDIO





ADDITIONAL RECOMMENDATIONS AND SITES TO CHECK



TAG
Lending Pad

[**VISIT PAGE**](#)

Hubspot
Tutorial

[**VISIT PAGE**](#)

Hubspot Help
Center

[**VISIT PAGE**](#)

Password: TLG2022\$

SALES
Learning Center

[**VISIT PAGE**](#)

OPERATIONS
Learning Center

[**VISIT PAGE**](#)

NEW HIRES
Learning Center

[**VISIT PAGE**](#)

Contact Marketing Team



**If you need
assistance,
we can TAG
TEAM this
together!**



Onboarding Guide

Thank You and

Welcome to the

