

We Help Lenders Close More Loans

THROUGH BETTER BORROWER ENGAGEMENT



CRM & Lead Management

A modern CRM is about significantly more than just initiating contact with potential leads and storing their contact information. It involves nurturing contacts and delivering powerful engagement

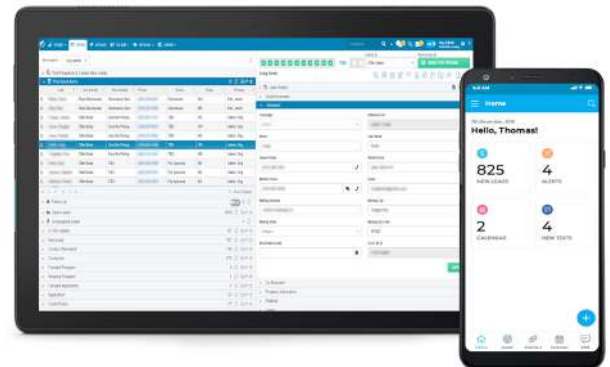
creating customers for life while maintaining a dynamic repository of contact interaction.

Insellerate's industry leading CRM solution records your customers' contact information and remembers the details of your relationship and every interaction along the buyers journey—whether by phone



Communicate Better With Your Borrowers and Lenders

- › Real-time automated communications
- › Contact strategy management and automation
- › East to use tools



Build Better Relationships with Your Realtors/Referral Partners

- › Automated loan status updates
- › through text and emails
- › Report on what realtor/referral partners are sending your business
- › Automate branded marketing and co-marketing



The Mortgage Industry's Most Innovative Customer Experience Platform

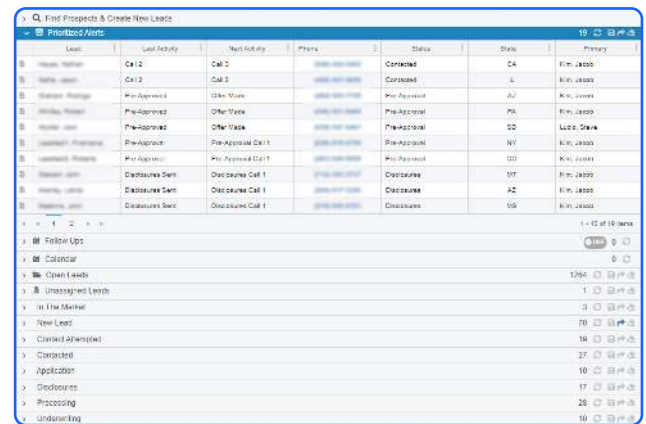
Drive Sales Performance

Transform leads into transactions that build relationships and ultimately create customers for life through effective lead management. Customer engagement depends on the speed at which your sales teams respond to today's consumer inquiries and the effectiveness of the personalized communication journey—whether by phone, email, text, social media or any other touchpoint.

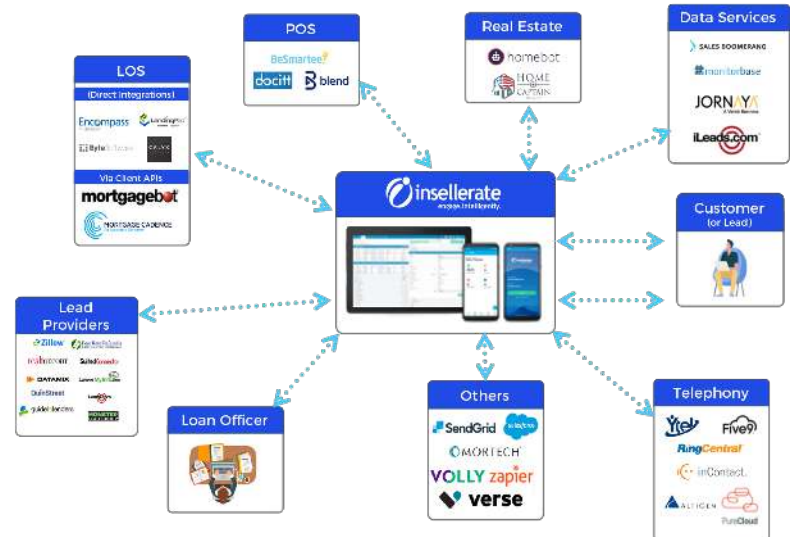
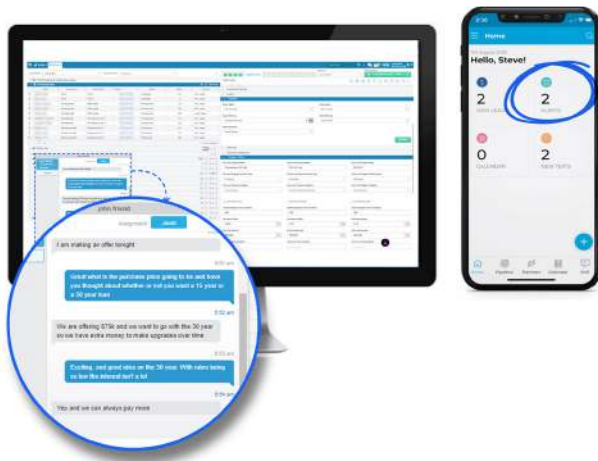


Lead Management Delivers:

- › Intelligent distribution and management of leads
- › Lead & workflow prioritization
- › Inbound & Outbound Call Handling
- › Priority alerts
- › Insta-dial
- › Lead routing
- › Inbound call routing
- › Contact strategy management and automation (alerts and with our open telephony API's and numerous integrations).



Lead	Lead Activity	Next Activity	Phone	Status	State	Priority
1. Home Loan	Call 2	Call 2	555-555-5555	Contacted	CA	High
2. Home Loan	Call 2	Call 2	555-555-5555	Contacted	IL	High
3. Home Loan	Pre-Approved	Other Value	555-555-5555	Pre-Approved	AZ	High
4. Home Loan	Pre-Approved	Other Value	555-555-5555	Pre-Approved	PA	High
5. Home Loan	Pre-Approved	Other Value	555-555-5555	Pre-Approved	SD	High
6. Home Loan	Pre-Approved	Other Value	555-555-5555	Pre-Approved	NY	High
7. Home Loan	Pre-Approved	Other Value	555-555-5555	Pre-Approved	CO	High
8. Home Loan	Disclosures Sent	Disclosures Call 1	555-555-5555	Disclosures	VT	High
9. Home Loan	Disclosures Sent	Disclosures Call 1	555-555-5555	Disclosures	AZ	High
10. Home Loan	Disclosures Sent	Disclosures Call 1	555-555-5555	Disclosures	OR	High



TRUSTED BY LENDING LEADERS SINCE 2013

