

We Help Lenders Close More Loans

THROUGH BETTER BORROWER ENGAGEMENT

Enhance Sales Organization Effectiveness

Turn Your Borrower Data Into Actionable Insights and Intelligent Engagement

To communicate and genuinely connect with today's consumer, sales teams need to personalize touch points throughout the customer's journey while making each engagement relevant to the prospect's specific business requirements.



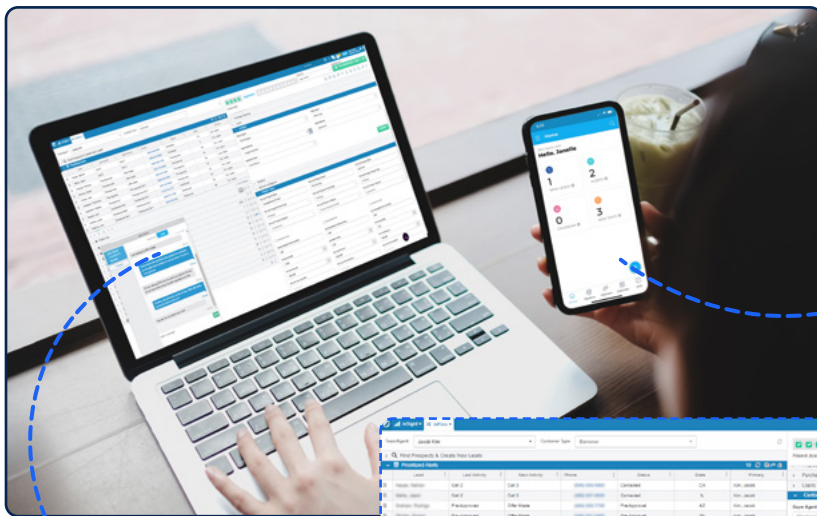
EXPANDED
PIPELINES



TIMELY AND
EFFECTIVE OUTREACH

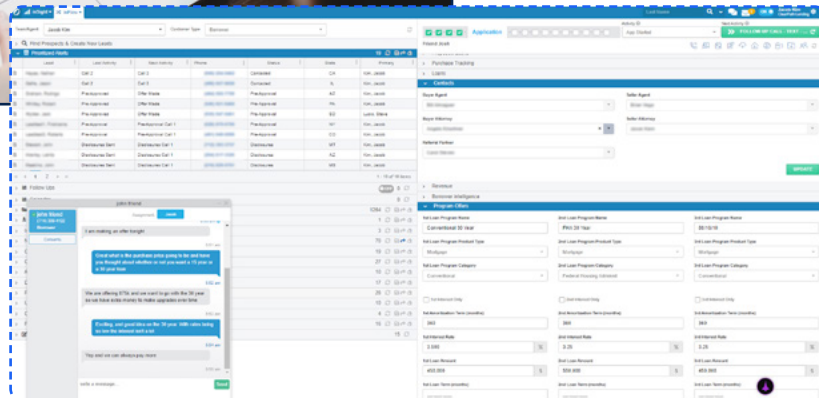
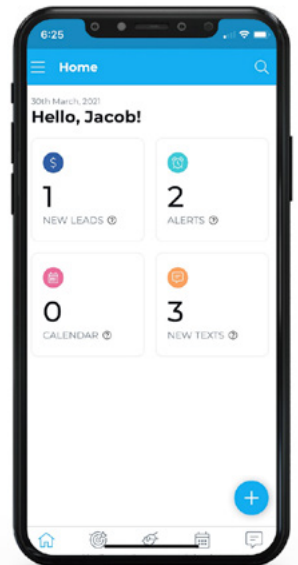


ENHANCED
SALES CONVERSIONS



EASY ACCESS TO DATA
REFERRAL MANAGEMENT
AND STRONGER USER
ADOPTION

PRIORITY ALERTS



The Mortgage Industry's Most Innovative Customer Experience Platform

Sales Enablement Key Features

- › Priority Alerts
- › Mobile and Desktop
- › Insta-Dial
- › Spa
- › Partner/Referral Tracking
- › Click To Call
- › Inbound Call Routing
- › Contact Strategy Management
- › Automation of Communications to Everyone Involved
- › Lead Distribution
- › Pre-built Content
- › Access to Relevant Info

Enable the Loan Officer to Work Better With Your Referral Partners and Know Where to Spend Their Time

Lead	Last Activity	Next Activity	Phone	Status	State	Priority
Mike Nelson	Call 2	Call 3	(916) 554-1820	Contacted	CA	High
Steve Jones	Call 2	Call 3	(916) 554-1820	Contacted	IL	High
William Rodriguez	Pre-Approval	Offer Made	(916) 554-1820	Pre-Approval	AZ	High
Whitney Rosen	Pre-Approval	Offer Made	(916) 554-1820	Pre-Approval	PA	High
Walter Lee	Pre-Approval	Offer Made	(916) 554-1820	Pre-Approval	SD	High
Leanne Smith	Pre-Approval	Pre-Approval Call 1	(916) 554-1820	Pre-Approval	NY	High
Leanne Smith	Pre-Approval	Pre-Approval Call 1	(916) 554-1820	Pre-Approval	CO	High
Leanne Smith	Disclosures Sent	Disclosures Call 1	(916) 554-1820	Disclosures	MT	High
Leanne Smith	Disclosures Sent	Disclosures Call 1	(916) 554-1820	Disclosures	AZ	High
Leanne Smith	Disclosures Sent	Disclosures Call 1	(916) 554-1820	Disclosures	MS	High

Referral Partner Co.	Referral Partner Co.	Referral Partner St.	Referral Partner Co.	Total Leads	Conversion Rate	New Lead	Application	Pre-Approval	Underwriting	Funded	No Deal
Wells Fargo	Bank of America	TD Bank	Bank of America	10	8.5%	1	1	1	1	1	1
Bank of America	Bank of America	Bank of America	Bank of America	10	10.5%	2	2	2	2	2	2
Bank of America	Bank of America	Bank of America	Bank of America	10	10.5%	2	2	2	2	2	2



POWERFUL DATA INSIGHTS



LEVERAGE DATA TO ENHANCE ENGAGEMENT



PERSONALIZE OUTREACH



BUILD BETTER BORROWER RELATIONSHIPS



DELIVER TIMELY MESSAGING



EMPOWER LO'S WITH INTELLIGENT ENGAGEMENT

TRUSTED BY LENDING LEADERS SINCE 2013



LEARN MORE AT INSELLERATE.COM OR CALL 855-973-1646 FOR A DEMO

