

We Help Lenders Close More Loans

THROUGH BETTER BORROWER ENGAGEMENT

CRM & Lead Management

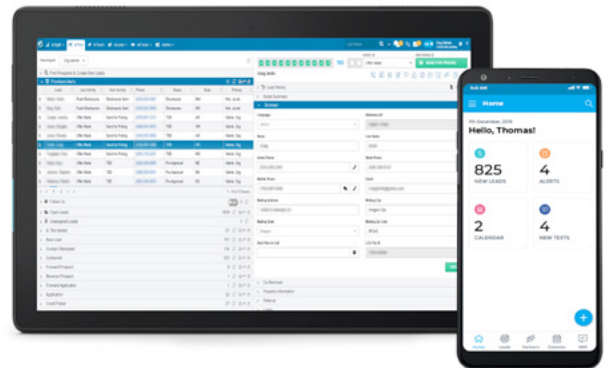
A modern CRM is about significantly more than just initiating contact with potential leads and storing their contact information. It involves nurturing contacts and delivering powerful engagement creating customers for life while maintaining a dynamic repository of contact interaction.

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



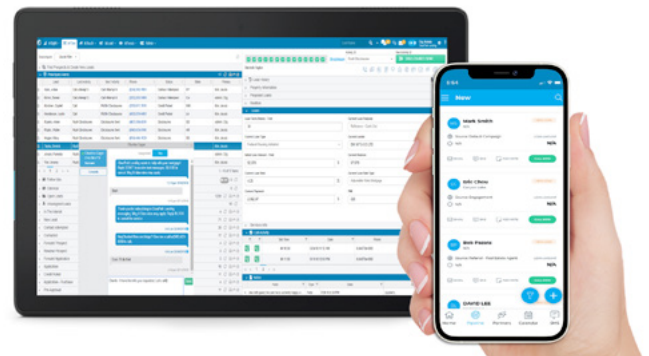
Communicate Better With Your Borrowers and Lenders

- › 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

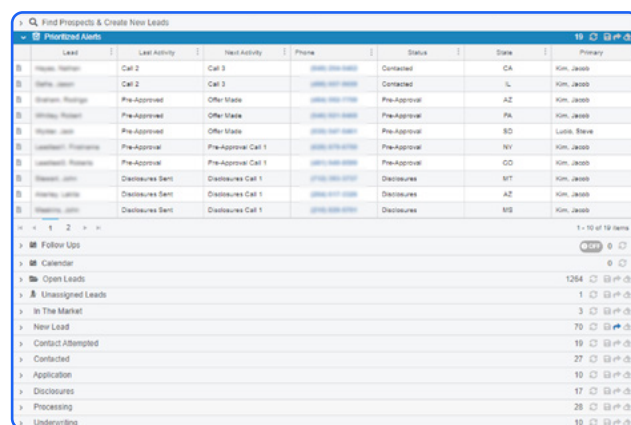
Drive Sales Performance

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.

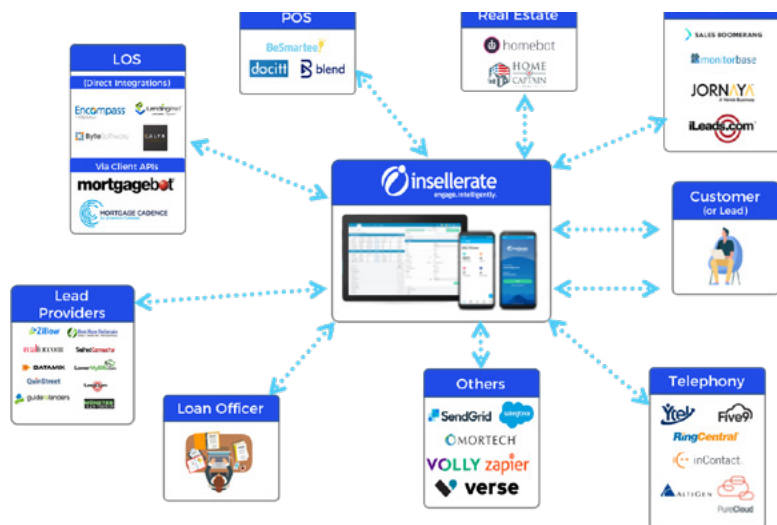
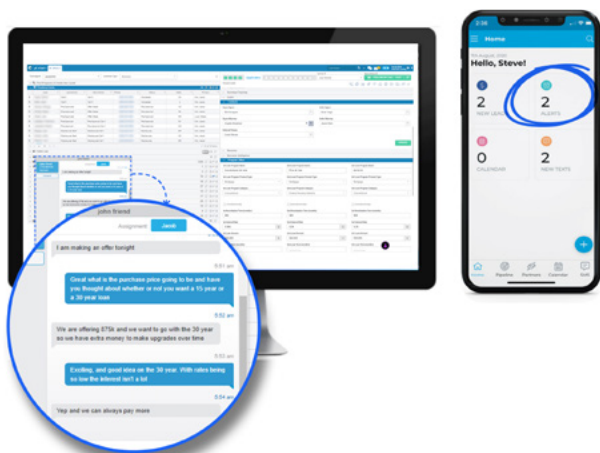


Lead Management Delivers:

- › 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
Missy Nelson	Call 2	Call 3	(916) 556-8888	Contacted	CA	Kim, Jason
John Jones	Call 2	Call 3	(916) 556-8888	Contacted	IL	Kim, Jason
Robert Morgan	Pre-Approved	Offer State	(916) 556-8888	Pre-Approval	AZ	Kim, Jason
William Robert	Pre-Approved	Offer State	(916) 556-8888	Pre-Approval	PA	Kim, Jason
John Jones	Pre-Approved	Offer State	(916) 556-8888	Pre-Approval	SD	Lisa, Steve
Anthony Thomas	Pre-Approved	Pre-Approval Call 1	(916) 556-8888	Pre-Approval	WV	Kim, Jason
Anthony Thomas	Pre-Approved	Pre-Approval Call 1	(916) 556-8888	Pre-Approval	CO	Kim, Jason
Michael John	Disclosures Sent	Disclosures Call 1	(916) 556-8888	Disclosures	VT	Kim, Jason
Michael John	Disclosures Sent	Disclosures Call 1	(916) 556-8888	Disclosures	AZ	Kim, Jason
Michael John	Disclosures Sent	Disclosures Call 1	(916) 556-8888	Disclosures	MS	Kim, Jason



TRUSTED BY LENDING LEADERS SINCE 2013

