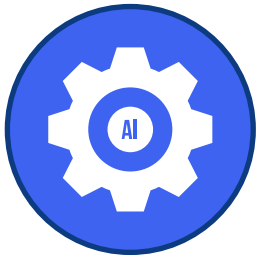# Revolutionizing Lending With AI-Powered Technology

Uncover the incredible impact of game-changing technology on sales management, loan officer productivity, and the customer journey like never before.

Sales Manager Efficiency
Enhancing Sales Management With AI

› Easily turn Artificial Intelligence insights into actionable events utilizing Open AI.

› Increase Sales manager effectiveness and lower sales management cost by automating call reviews.

› Our AI-powered solution offers real-time call monitoring, coaching, and insights, reducing sales management costs significantly.

Loan Officer Efficiency
Empowering Loan Officers with AI Insights

› Lower wasted time of Loan Officers by calling and speaking to borrowers that don't qualify or need a loan.

› Increase loan officer efficiency by giving them the right leads to call based on deal probability and intelligent notes.

› AI analyzes customer data to provide personalized insights, helping loan officers offer the right loan quickly.

Enhanced Customer Experience
Delivering Personalized Customer Interactions

› Improve the borrower experience by reducing repeated conversations and providing marketing and actionable follow-ups based on specific needs.

› AI enables loan officers to engage customers with relevant, personalized conversations, driving satisfaction and loyalty.

Integration and Flexibility
Seamless Integration and Flexibility
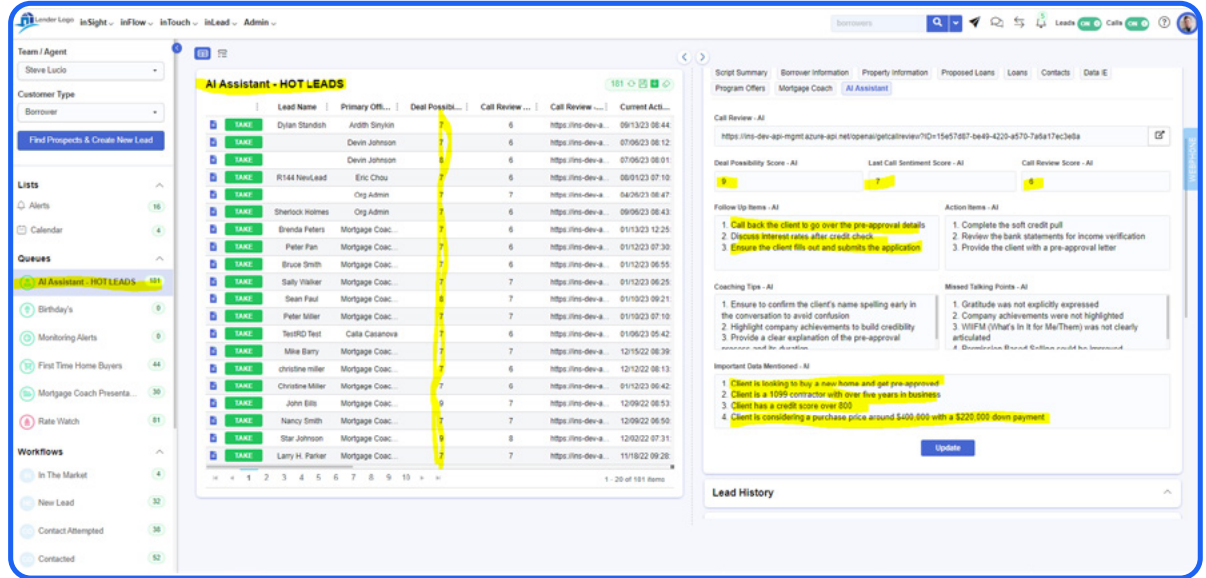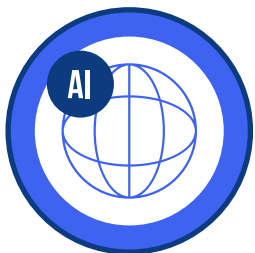
› Easily integrates with any CRM, allowing for customization and optimization based on specific business requirements.

› Can be utilized for any sales or customer service channels or needs beyond mortgage, making it highly adaptable and future-proof.

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

Hot List

AI Call Assistant

Sentiment Analysis

Understand the general tone and customer interest based on advanced AI models to determine:
- ❯ Customer interest
- ❯ Loan officer performance
- ❯ Overall customer sentiment
- ❯ Call outcome

Important Data

- ❯ What were the specifics of the call?
- ❯ Current loan amount
- ❯ Value of home
- ❯ Income amount
- ❯ Credit
- ❯ Amount for down payment
- ❯ When they are looking to buy?
- ❯ If they have a realtor?
- ❯ Who is on the loan?
- ❯ Contact information

And other important information.

Action Items

Based on the call what are the next steps? Example:
- ❯ Pull credit
- ❯ Send rates
- ❯ Update loan application
- ❯ Send over contact information for realtor
- ❯ Send disclosures
- ❯ Borrower to send over bank statements

Deal Possibility Assessment

AI can determine whether the customer has the potential to qualify for and need a loan, based on:
- ❯ Credit
- ❯ Income
- ❯ Loan to value
- ❯ Need
- ❯ Benefit
- ❯ Implied or expressed interest

And other variables.

Coaching Tips

Easy to follow specific coaching tips based on the call. Example:
- ❯ Whether they confirmed the best time to call
- ❯ Clarified a question
- ❯ Need to build more rapport with small talk
- ❯ Need to build credibility

And other many other intelligent tips

Follow Up

Based on call what are the follow up items? Example:
- ❯ Call in a day to review loan options
- ❯ Discuss down payment with borrower
- ❯ Clarify income and review tax returns
- ❯ Email update disclosures

Call Review

Score your Loan Officers or CSR's based on general sales technique and rules plus any custom desire.
- ❯ Did they build rapport?
- ❯ Did they clearly explain the option?
- ❯ Did they listen to and address the customers needs?
- ❯ Did they ask for the business or any other specific needs?
- ❯ Company values
- ❯ Compliance

Missed

Key items missed on call. Example ?s:
- ❯ Did they state their NMLS number?
- ❯ Did they verify the email address?
- ❯ Did they use permission-based selling?
- ❯ Did they build credibility?
- ❯ Did they use the company mission statement?
- ❯ Did they advise the call was being monitored or recorded?

The Future is Now!

With AI-powered insights, lenders can revolutionize their operations and gain a competitive advantage.

Don't wait for the future; adopt this game-changing technology now to stay ahead in the lending industry.