



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.

E	A

Sales Manager Efficiency Enhancing Sales Management With Al

- > 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.
- > Al 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.

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AI Call Assistant 📻

Hot List

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Steve Lucio	•									
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Borrower	•		1	Lead Name	Primary Otti	Deal Possibi	Call Review 1	Call Review	Current Acti	
	_		TANE	Dylan Standish	Ardith Sinykin	7	6	https://ns-dev-a	09/13/23 08:44	
Find Prospects & Create New L	ead		TAKE		Devin Johnson	1	6	https://ns-dev-a	07/06/23 08:12	
			TAKE		Devin Johnson	•	6	https://ins-dev-a	07:06/23 08:01	
Lists	~		TAKE	R144 NexLead	Eric Chou	7	6	https://ns-dev-a	08/01/23 07:10	
		8	TAKE		Org Admin	,	7	https://ns-dev-a	04/26/23 08:47	
Alerts	16		TAKE	Sherlock Holmes	Org Admin	2	6	https://ns-dev-a	09/06/23 08:43	
Calendar	4		TAKE	Brenda Peters	Mortgage Coac	7	6	https://ns-dev-a	01/13/23 12:25	
			TAKE	Peter Pan	Mortgage Coac	7	6	https://ns-dev-a	01/12/23 07:30	
leues	^	D	TAKE	Bruce Smith	Mortgage Coac	7	6	https://ns-dev-a	01/12/23 06:55	
Al Assistant - HOTLEADS	- 101		TAKE	Sally Vialker	Mortgage Coac	7	7	https://ns-dev-a	01/12/23 06:25	
			TAKE	Sean Paul	Mortgage Coac		7	https://ns-dev-a	01/10/23 09:21	
Birthday's	۲		TAKE	Peter Miller	Mortgage Coac	7	7	https://ns-dev-a	01/10/23 07:10	
Monitoring Alerts	0		TAKE	TestRD Test	Calla Casanova	1	6	https://ns-dev-a.	01/05/23 05:42	
		B	TAKE	Mike Barry	Mortgage Coac	7	7	https://ns-dev-a	12/15/22 08:39	
First Time Home Buyers	- 44		TAKE	christine miller	Mortgage Coac	4	6	https://ns-dev-a	12/12/22 08:13:	
Mortgage Coach Presenta	30		TANE	Christine Miller	Mortgage Coac	7	6	https://ns-dev-a	01/12/23 00:42	
wongage coach Presena			TAKE	John Bills	Mortgage Coac	9	7	https://ns-dev-a	12/09/22 08:53	
Rate Watch	81		TAKE	Nancy Smith	Mortgage Coac	7	7	https://ns-dev-a	12/09/22 06:50	
		5	TAKE	Star Johnson	Mortgage Coac		8	https://ns-dev-a_	12/02/22 07:31	
orkflows	^		TANE	Larry H. Parker	Mortgage Coac	7	7	https://ns-dev-a	11/18/22 09:28	
In The Market	4		+ 1 2	3 4 5	6 7 8 9 1	10 × ×		1	- 20 of 101 items	'
New Lead	32									
Contact Attempted										
Contacted	(52)									

Program Offers Mortgage Coac	th Al Assistant				
Call Review - Al					
https://ins-dev-api-mgmt.azure-	api.net/openal/getcallreview?ID	=15e57d07-be49-	4220-a570-7a6a17ec3e0a	G,	
Deal Possibility Score - Al	Last Call Sentiment	Score - Al	Call Review Score - Al		
9	7				
Follow Up Items - Al		Action Items - J	AI		
1. Call back the client to go o 2. Discuss interest rates after 3. Ensure the client fills out a	credit check	2. Review t	e the soft credit pull the bank statements for income verificat the client with a pre-approval letter	ion	
Coaching Tips - Al		Missed Talking	Points - Al		
1. Ensure to confirm the clien the conversation to aveid con 2. Highlight company achieve 3. Provide a clear explanation researce and its duration	fusion ments to build credibility	Cratitude was not explicitly expressed Company achievements were not highlighted WilFM (VMar's In It for Me/Them) was not clearly articulated Downlocking Baced Gallies could be immend			
Important Data Mentioned - N					
Client is tonking to buy a n Client is a 1099 contractor Client has a credit score on Client is considering a pure	with over five years in busine rer 800	<mark>6</mark> 5	down payment		
		Update			

AI Call Assistant

Sentiment Analysis

- >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

>Pull credit

- >Send rates
- >Update loan application
- >Send over contact information for realtor
- >Send disclosures
- >Borrower to send over bank statements

Deal Possibility Assessment

- >Credit
- >Income
- >Loan to value
- >Need
- >Benefit
- >Implied or expressed interest
- And other variables.

Coaching Tips

- >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

Call in a day to review loan options >Discuss down payment with borrower

>Clarify income and review tax returns >Email update disclosures

Call Review

- >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

- >Did they state their NMLS number?
- >Did they verify the email address?

r d credibility? use the company. on statement? bid they advise the call was being monitored or recorded? **The Future is Novv** With Al-powered insighter can revolutionize their and gain a compre-Don't wait for game-cl stav

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