

TRANSFORM LOAN OFFICER MOBILITY

Powerful Borrower Engagement from the Palm of Your Hand

Interact with your borrowers in a multitude of ways.



If you want to convert, your ability to respond immediately is critical—whether you are in your office, working remotely, in a meeting or at your kid's sporting event.

BORROWER JOURNEY



**Let's say you meet
face to face...**

Open Insellerate's
application from
your mobile device.



Then the magic happens.

Type in the lead, see who the
referral partner is, and add any
additional loan details.



**Receive an inbound call
from your direct mail or
Facebook ad campaign.**

The Insellerate system will route
calls to you based on the state
licensing, skills, lead caps and
send to your mobile phone.
Your consumers are being
interacted with immediately.



What if it's not a call?

The customer applies online through your website or you buy a lead from Zillow® or Lending Tree®. You will be alerted instantly.



The call goes to your mobile phone.

All the information will be routed to you whether you are at your desk or mobile.



Your customer is contacted in less than 30 seconds.

Now, you are able to manage face-to-face, digital, phone call or text.

This provides instant engagement that equals higher conversions.

WORK ON LOAN FILES FROM ANYWHERE

Instant access to:

- who your client's referral partners are.
- who the selling agent is.
- the house they are making an offer on.
- the buyer's agent.

Additional instant access:

- take an application.
- send to your LOS and processor.
- run disclosures.
- send out disclosures.
- order other services.

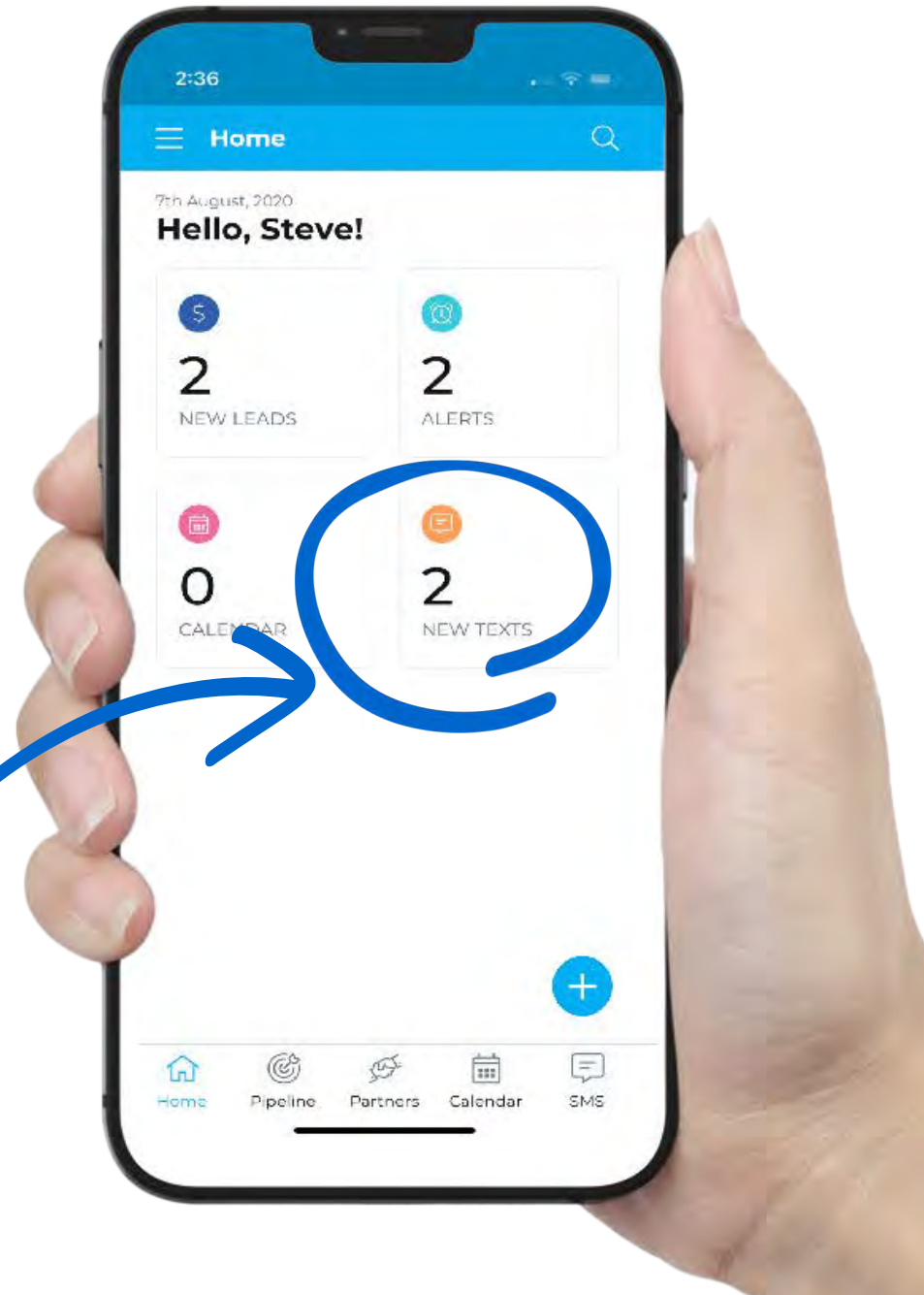
ALL FROM YOUR MOBILE DEVICE. *Talk about efficiency and responsiveness!*



POWERFUL ALERTS FROM YOUR HOME SCREEN

- New lead alerts.
- Prioritization alerts to easily organize your day for top efficiency.
- Calendar alerts for requests, invites or other information.
- Text message alerts.

THIS IS POWERFUL!



TRADITIONAL PITFALLS

Most CRM/Marketing engagement applications do not have full mobile capabilities.

IMAGINE you run an automated campaign, you are trying to engage your borrowers and they respond through a text message saying:

Hey, Wesley, I'm about to make that offer.
Can I afford a \$600,000 purchase amount?

YOU ARE on the way to an appointment. You are unable to respond when and where your prospective borrower needs you. You don't have their file or a compliant way to answer from your cell phone and are unable to respond until you get back in front of your computer.

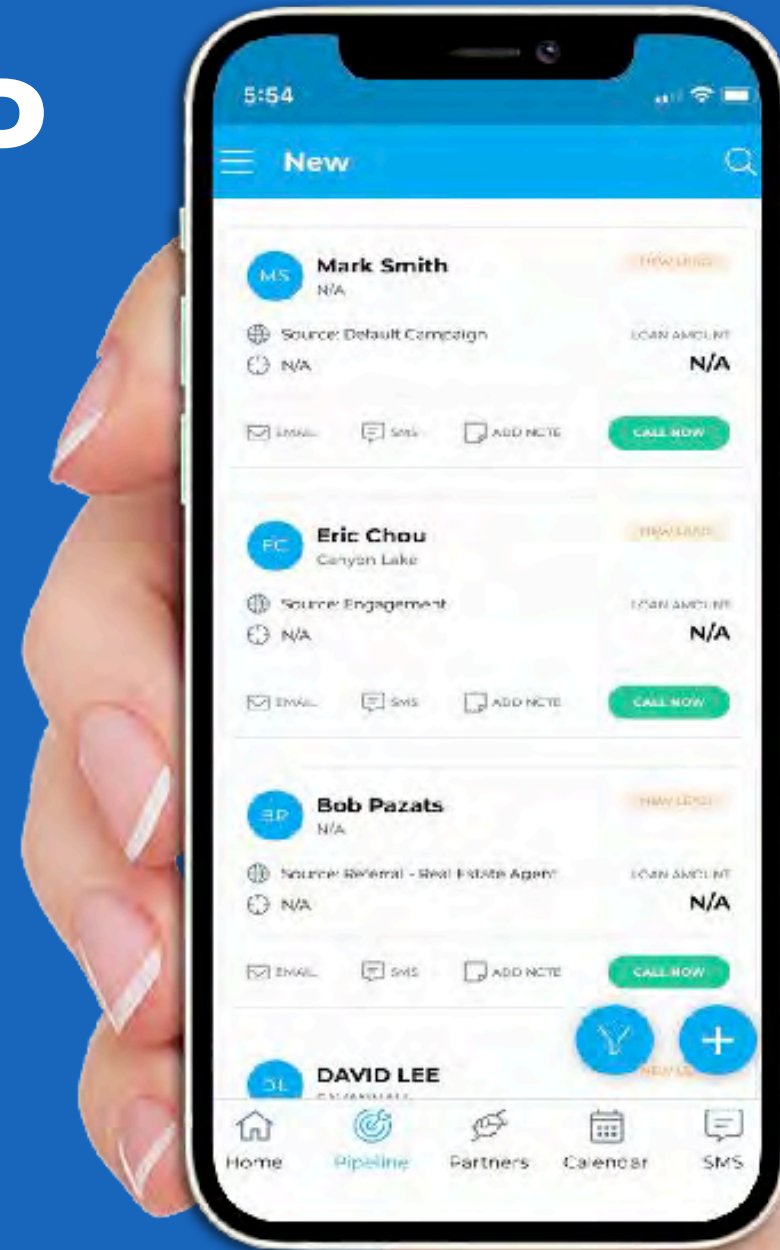
The opportunity slips away.



LOSE THE DESKTOP

Have access to everything from processing to prospects to referral partners—all from the palm of your hand.

While you are running Insellerate's platform, you have access to the entire engagement suite. Whether that's text messages, ringless voicemail, Facebook posts, Instagram posts, direct mail, phone calls or Google AdWords.



INSTANTLY ENGAGE

with Insellerate's first-of-its-kind full mobile solution, there is no waiting!

IMAGINE you run an automated campaign, you are trying to engage your borrowers and they respond through a text message saying:

Hey, Rachel, I'm about to make that offer.
Can I afford a \$600,000 purchase amount?

YOU'RE on the way to an appointment. **You don't need their file.** Right from your cell phone, you go into the system, get your borrowers file, and instantly and compliantly text back:

Yes Mark! You can afford \$600,000.

Mark makes the offer on the home.

Hey, Mark. I need to talk to your agent.

YOU CAN NOW instantly respond to the realtor!

Hey Brian! The offer has been made.

Great. Let me know when it's been accepted.

You have instantly responded to your borrower and the opportunity keeps progressing.

Continue to your appointment and update your pipeline remotely.



WORK LOAN FILES REMOTELY

- Click on processing loans.
- Locate your borrower and see what's going on with their loan.
- Open the information to understand purchase tracking.
 - ✓ rate lock was on the sixth
 - ✓ expires on the eighth
- Check other loan details about your borrower.

Knowledge and understanding of the borrower's file and instant access to the information by tracking:

- appraisal order dates
- underwriting conditions

You won't have to go into the LOS for this information.



RADICALLY TRANSFORM BORROWER ENGAGEMENT

- Instant interaction.
- Lead management.
- Referral partner management.
- Consistent experience, data and interaction throughout the application—regardless of mobile or desktop interface.

“No other solution provides the same experience from a desktop and/or mobile device.”

JOSH FRIEND, CEO





WE HELP LENDERS CLOSE MORE LOANS



Now you're able to go out and power your remote workforce and loan officers with the most comprehensive lead management and engagement solution through your mobile device.

Contact us to learn more.

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