



FULL SUITE CRM SOLUTION PROGRAM FEATURES

1.

LOS INTEGRATION

Unify®'s real time LOS integration system provides your loan officers with up to date information about their pipeline, facilitates automated communications and eliminates the need for multiple databases or duplicate effort.



2.

AUTOMATED EVENT DRIVEN MARKETING

Seize the opportunity right when it happens. Notifications trigger you to respond to events that could result in new transactions. Knowing important information about our customers is vital to building a lasting relationship. CRM Alerts keep you informed.



OPPORTUNITY ALERTS



BIRTHDAY ALERTS



LOAN ANNIVERSARY ALERTS



"MOVE UPDATE"



"JUST LISTED"



CREDIT ALERTS



RATE ALERTS

3.

MARKETING CONCIERGE

Automatically send communications, either direct mail or email, for specific events – holidays, rate adjustments, birthdays, closed loan. Leverage any combination of emails, greeting cards, direct mail or other communications.



4.

POST CLOSE/RETENTION

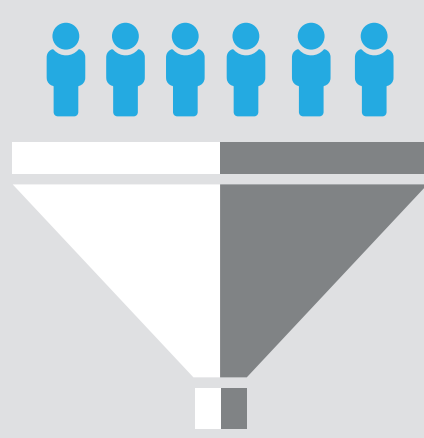
Marketing Set up with your budget in mind, these programs are designed to stay in touch with past clients and help make you their first choice when looking to finance again.



5.

REFERRAL PARTNER DATA

Did you know that 60% of a customer's referrals come in the first six months after closing a loan? Each campaign is created specifically for your customers and the mortgage they just received. Your contact information is included on each one and they may be co-branded with your important industry partners adding value to these relationships.



6.

CONTACT MARKETING DATA

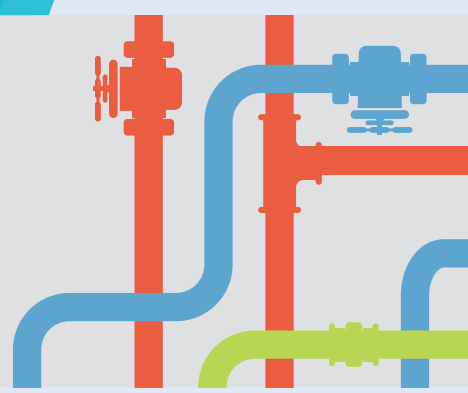
Get a snap shot of your marketing activities to contacts and quickly drill down to more detailed information.



7.

PIPELINE ALERTS

Easily view important information about loans in your pipeline. Manage them before they become issues. View your loan details, communications, contacts and UW conditions with ease.



8.

CALENDAR

Easily synchronize your calendars in one place. Add tasks and appointments and receive reminders and alerts seamlessly with Outlook integration.



9.

PRODUCTION STATISTICS

Knowing information about your own performance and production helps keep you motivated and on track to meet your business and financial goals.



10.

CORE TRAINING MODULE

Learn from top mortgage brokers in the country. Break records, increase production, improve process and fill your pipeline.



11.

MARKETING SERVICE AGREEMENTS

We are an extension of your marketing department, a partner and can provide ongoing marketing and communication support.



12.

DATABASE SERVICES

Data can be complex. Our team of professionals can provide you with the mortgage database management services that will help organize your files into useful tools for business growth.

