

We Help Lenders Close More Loans

THROUGH BETTER BORROWER ENGAGEMENT



Better Borrower Engagement by overcoming the biggest hurdles to closing more loans...

Having the Right Technology
(an all-inclusive Marketing & Sales Engagement Platform)

Pre-Built Strategy & Workflows
(timing, frequency, communication channel)

Pre-Designed Marketing Content
(compliant content created by mortgage experts for enhanced borrower engagement)

Maximum Security To Safeguard Your Data
(SSAE16, Advanced Network Security, Best In-class Infrastructure)



ENGAGEMENT

- ▶ Leverage Pre-Built Content
- ▶ Multi-channel Marketing
- ▶ Actively Engage Current and Past Prospects
- ▶ Build Customers for Life



CRM/ LEAD MANAGEMENT

- ▶ Intelligently distribute and manage leads
- ▶ Lead and workflow prioritization
- ▶ Mortgage centric sales, marketing and realtor reports
- ▶ In-app voice and text communication



COMMUNICATE BETTER WITH YOUR BORROWERS AND REALTORS

- ▶ Real time automated communications
- ▶ Contact strategy management automation
- ▶ Easy to use tools

Trusted By Leading Lenders



The Mortgage Industry's Most Innovative Marketing and Sales Engagement Platform.

DYNAMIC TECHNOLOGY, STRATEGY AND CONTENT FOR EVERY CHANNEL OF YOUR BUSINESS TO ENSURE ENGAGEMENT THROUGHOUT THE BORROWERS JOURNEY.

RETAIL

CONSUMER DIRECT

insellerate
engage.intelligently®

WHOLESALE

Pre-designed Marketing Content

(compliant content created by mortgage experts for enhanced borrower engagement)



Many unique nurture paths

CLASSIC NEW LEAD ACQ 12

CLASSIC CASH-OUT REFINANCE 7

CONTEMPORARY FIRST TIME HOME BUYER 9

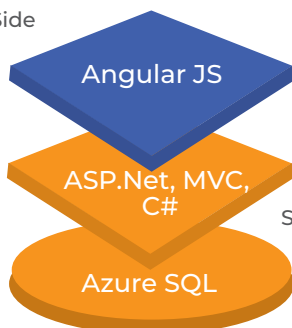
CLASSIC ENGAGED 8

Each campaign is complete with multiple Emails, Text Social Media Ads and Ringless Voice Mail that are ready to go!

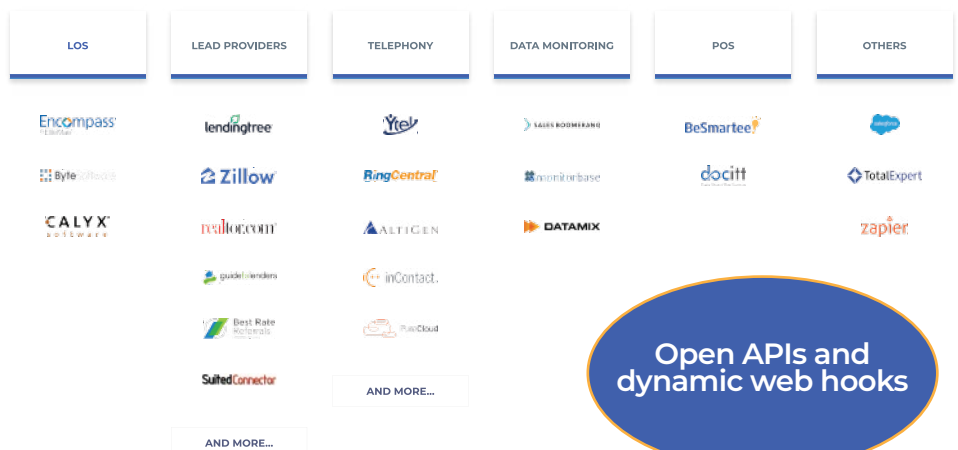
We integrate with the software that is powering your business today and into the future

TECH STACK Hosted in Azure PaaS

Client Side



Server Side



Open APIs and dynamic web hooks

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