

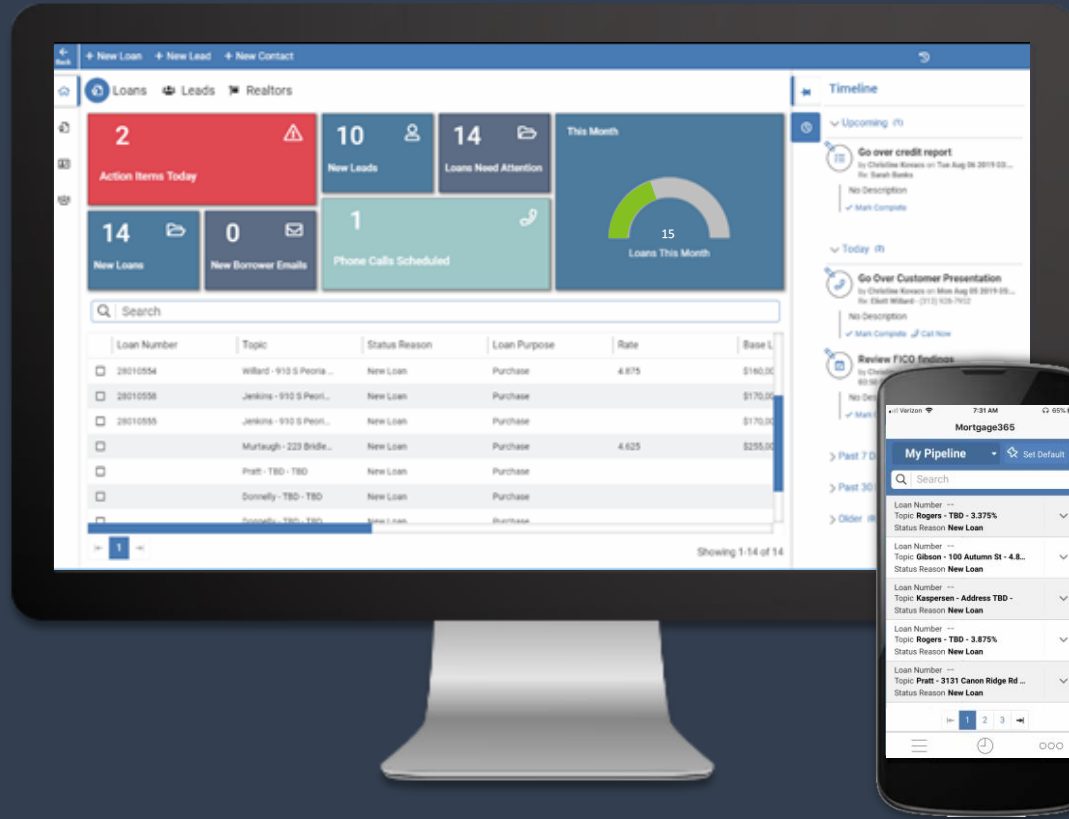


# Mortgage365

Platform Overview



# Mortgage365



Credit



Valuation



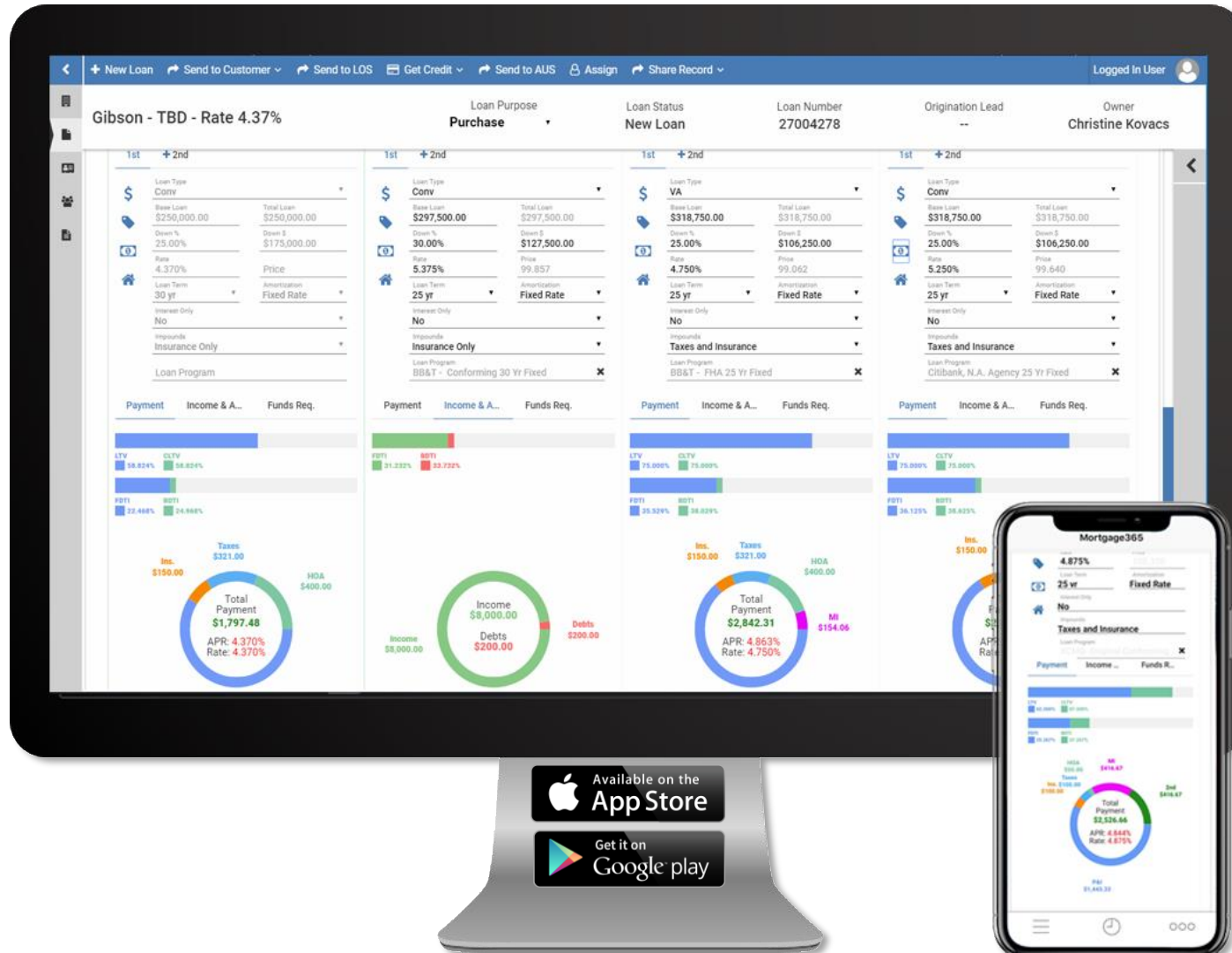
Pricing



AUS



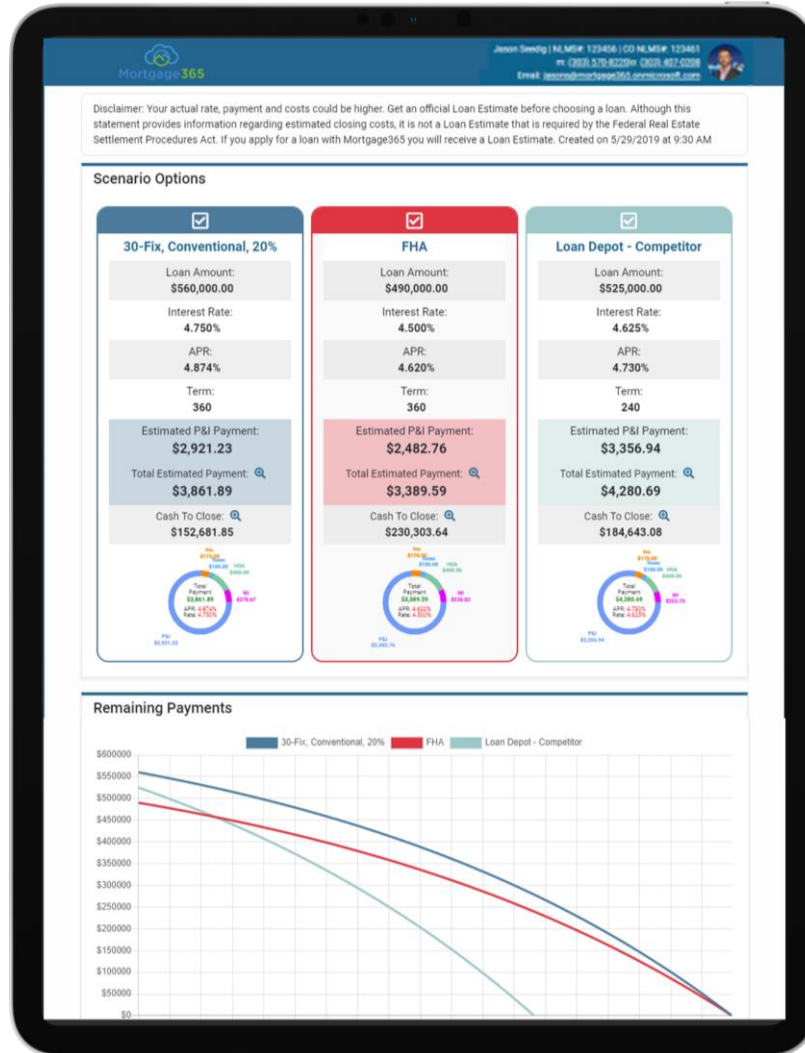
# Features You & Your Borrowers Will Love



Our Mortgage365 applications combine with MortgageOS to unlock the full power and potential of the Microsoft Cloud and Platform Technologies for lenders looking to create BETTER, SMARTER, FASTER loan experiences.

Our community today enjoys **real-time pricing**, credit, loan and AUS data and features in their Outlook, Dynamics CRM and mobile apps.

# Fully Loaded CRM Mobile App



## Mortgage365

### Cloud Aware MortgageOS Includes:

- ✓ Lead Management
- ✓ Marketing Automation
- ✓ Live Pricing
- ✓ Credit
- ✓ AUS, Fees, Valuation
- ✓ Bi-Directional LOS

### M365 License Provides:

- ✓ Mortgage365 Desktop
- ✓ Outlook App
- ✓ iOS App
- ✓ Android App

# Lead & Pipeline Management



## Mortgage365

### Top of Funnel

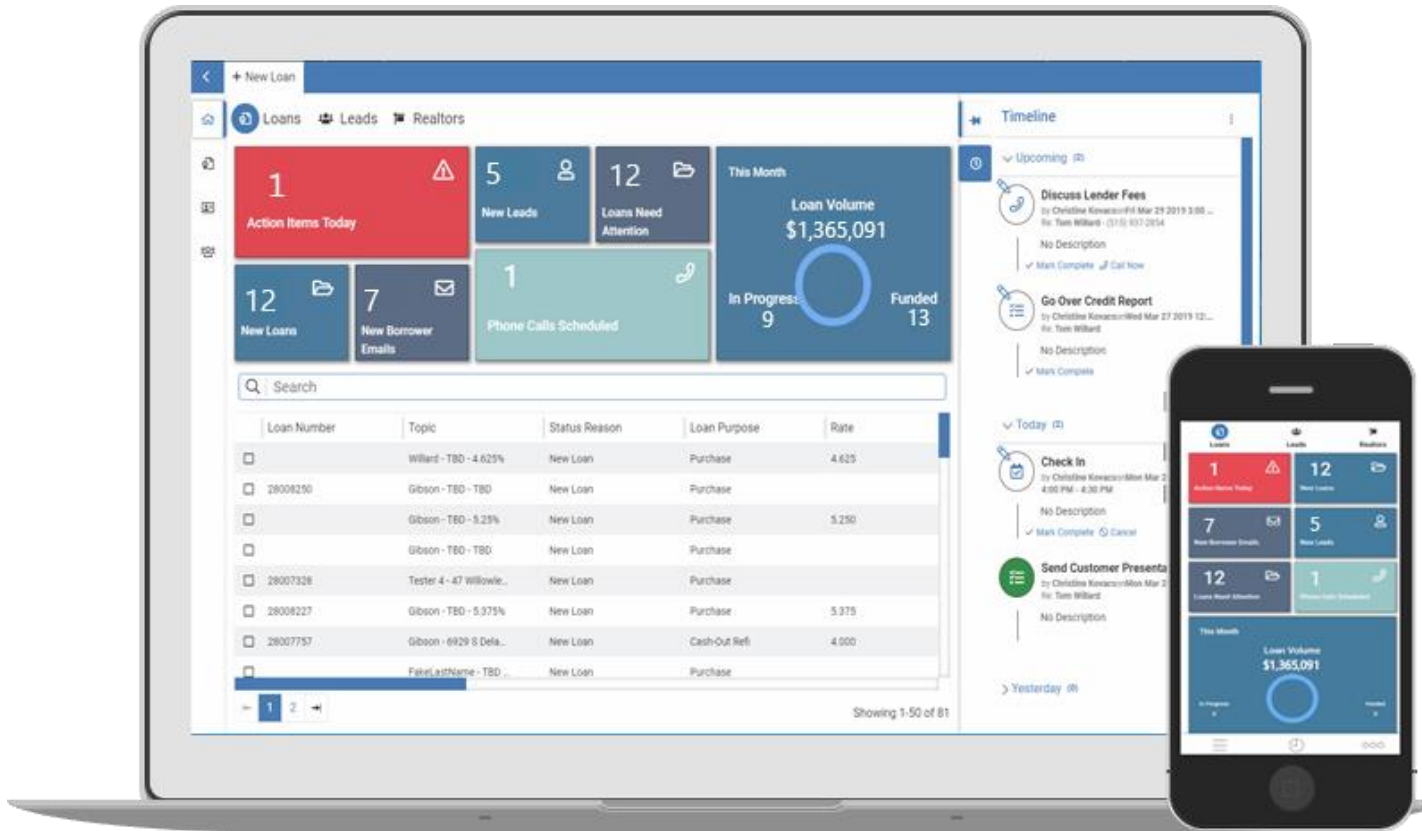
- ✓ Fully Integrated Lead Providers
- ✓ Fully Integrated Five9 Dialer
- ✓ Automated Lead Marketing Distribution
- ✓ Prioritization
- ✓ Campaign Management
- ✓ Activity Center Intelligent Alerts & Lists

### Mid Funnel

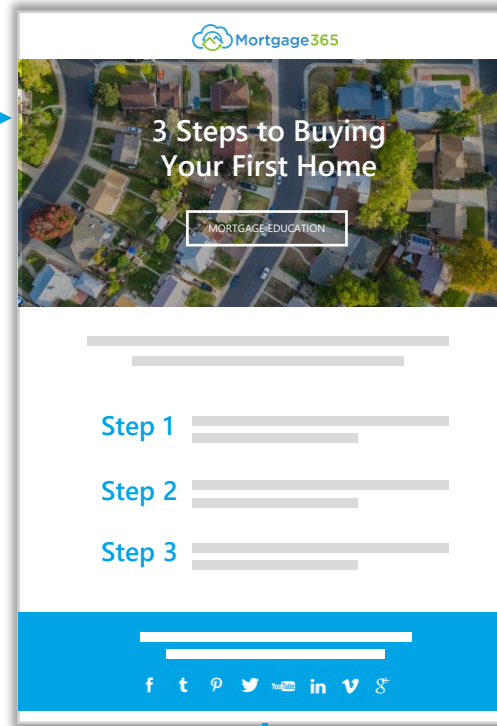
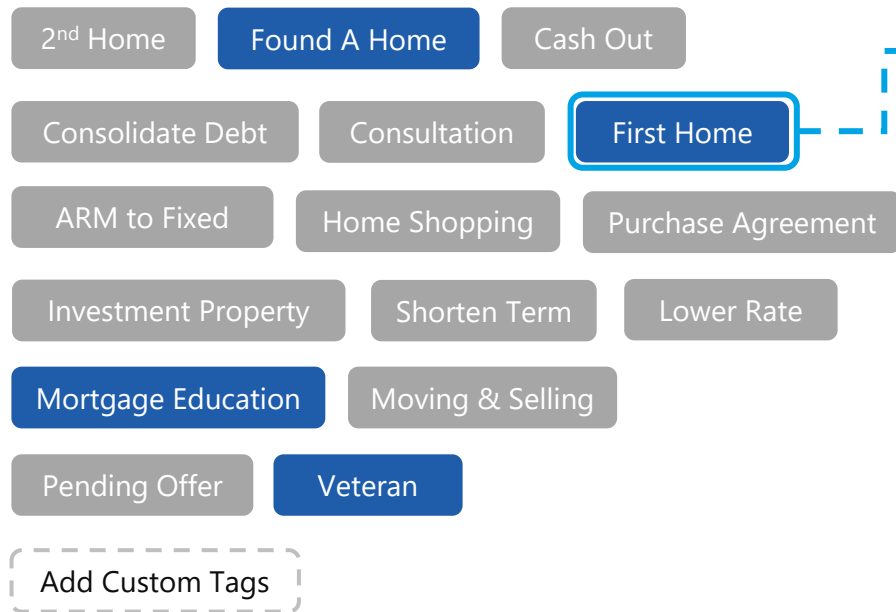
- ✓ Loan Scenario Presentation
- ✓ LOS Loan Pipeline
- ✓ Automated In Process Marketing
- ✓ Realtor Lists

### Bottom of Funnel

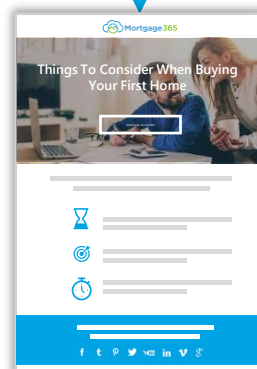
- ✓ Automated Post Close Marketing
- ✓ Portfolio Retention Campaigns
- ✓ Trigger Alerts



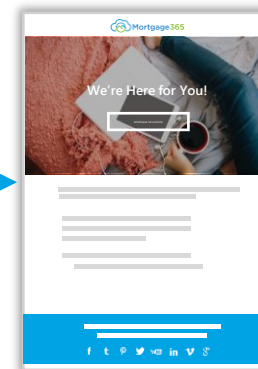
# Automated Marketing – Why Cloud



Wait 2 Days



Wait 7 Days



Our Why Cloud ties marketing and sales together; by allowing users to quickly select what the Borrower's motivations, specific needs and persona are.

This allows highly targeted and personal email to be sent.

The LOS statuses are mapped to specific Marketing Events which enables the right message to be sent at the right time.

# Microsoft Dynamics 365 For Marketing

## Feature Summary

### Omni Channel Communication

Customizable Email Templates

Landing Pages & Forms

Reusable Content Blocks, Videos & Marketing Calendar

### Full Lifecycle Marketing

Buyer's Journey Designer

360-Degree View

Behavior-Based Lead Nurture

In Process & Post Close Campaigns

### Embedded Intelligence

Multiple Lead Scoring Grades

Interactions Insights

Social Insights

### Smart Marketing

Persona-Driven Campaigns

Advanced Suppression Logic

Intelligent Segmentation

Loan Data Driven Journeys

### Reporting

Dashboards & Insights

Surveys

Advanced Analytics via Power BI

Easy to Use & Extend

# Built-in Mortgage Campaigns

Mortgage365 includes email templates, segments and customer journeys to support the following mortgage-specific campaigns:

- Nurture Campaign
- Pre-Qual Campaign
- Loan In Process Campaign
- Post-Close Campaign

The screenshot displays the Mortgage365 customer journey builder interface. At the top, a dropdown menu shows 'Customer Journey: Information' and 'Post-Close'. The main canvas shows a workflow with several steps: 'Segment group New Segment', 'Survey Please let us know how we did.', 'Trigger 5 Day Delay', 'Launch workflow Comments review comments ...', 'Trigger Survey Score over an 8?', and 'Marketing email Thanks! Can...'. A 'Marketing email message Thank you. Would you recom...' step is also visible. A 'Scheduler 20 Day Delay' step is connected to the 'Marketing email message' step. A data table is overlaid on the left side of the interface, showing 'Volume' and 'KPIs' for the campaign.

Volume		
Inflow	11	100.00 %
Processing	0	0.00 %
Blocked	0	0.00 %
Failed	0	0.00 %
Processed	11	100.00 %

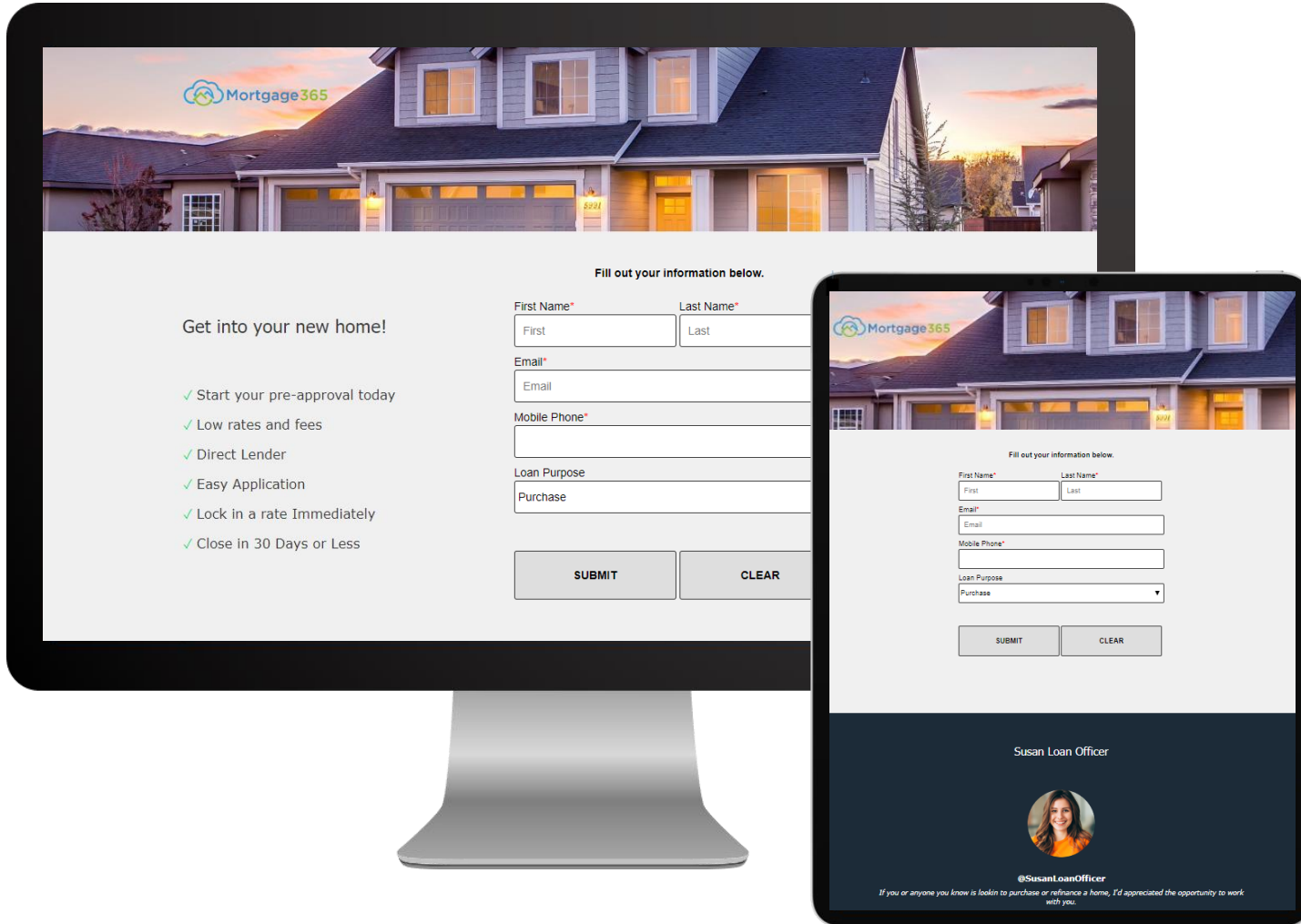
KPIs		
Delivered	11	100.00 %
Opened	4	36.36 %
Clicked	4	36.36 %
Soft bounced	0	0.00 %
Hard bounced	0	0.00 %
Blocked	0	0.00 %
Block bounced	0	0.00 %

A search bar is visible at the bottom right of the interface, with a search icon. Below the search bar, there are several categories of actions and targets:

- Content:** Marketing email message, Marketing page
- Event:** Survey
- Actions:** Activity, Launch workflow, Create lead, LinkedIn campaign
- Targets:** Segment, Record updated
- Flow Control:** Scheduler, Trigger, Splitter, Splitter branch



# Marketing Portals

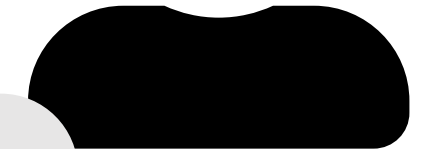
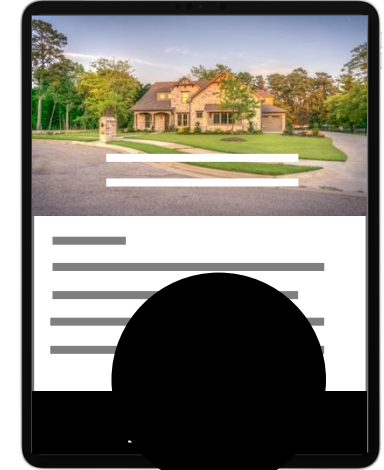
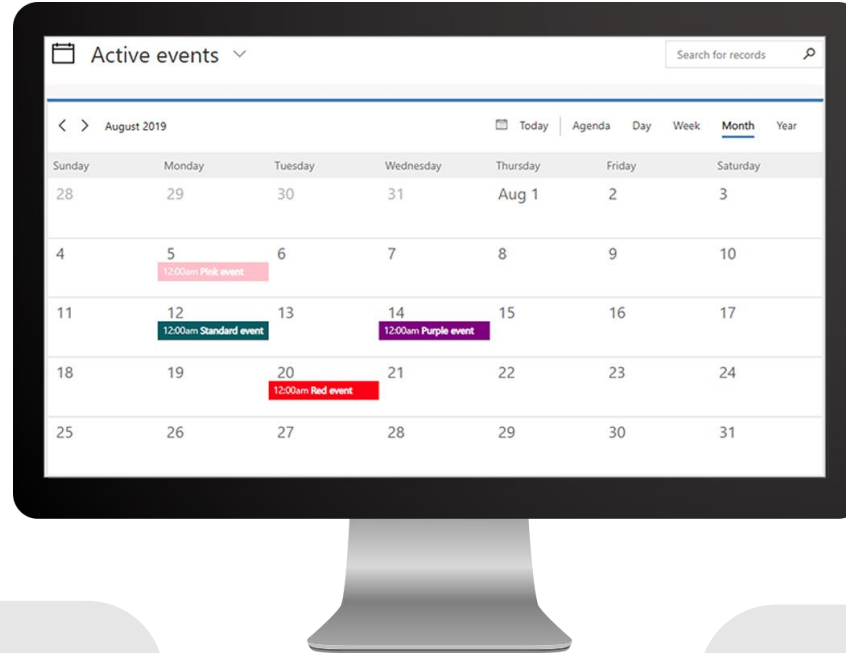
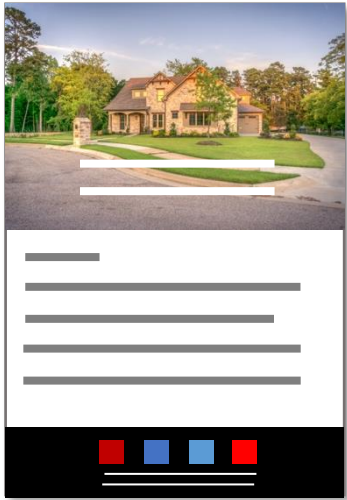


## Mortgage365

- Easily recreate landing pages and forms to post on external sites
- Use code-snippets from existing landing pages to bring data straight into Mortgage365
- Use portals to deploy web-facing landing pages on your websites
  - Loan Officer portals
  - Realtor portals
  - Company portals
- Portal technology uses a modern interface built on CSS3, HTML5, and Bootstrap.

# Lead Scoring and AI

## Intelligent Customer Engagement



**Spam Score:** Craft messages that generate a low spam score to improve email deliverability and credibility.

**Smart Scheduler:** Let the AI tell you specifically and generally the best times to send content to borrowers to raise your open rate.

**Segment Booster:** Watch the AI pull in 'best contacts' from a current segment and add them to a running customer journey to boost subscription rates and customer interaction.

