TRUE MORTGAGE CRM

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BNTouch CRM Dashboard

Whitepaper, October 08

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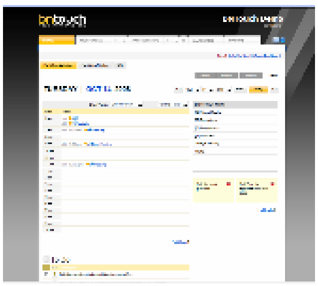
Introduction

To stay competitive, mortgage professionals must "act on analytics." They must always keep an eye on their numbers, determining what's working and what's not, and constantly make adjustments to improve sales and increase revenue. These are just some of the key essential to surviving and thriving in today's competitive market. As easy as it sounds, every professional knows that it is almost impossible to get real time data analysis to effectively stay competitive.

With traditional CRM's and database managers, retrieving custom tailored reports usually involves IT Departments and weeks of training, testing and inefficient work. With the new BNTouch Dashboard running reports and setting up real-time analysis only requires a few clicks. Your sales professionals will no longer rely on spreadsheets, notes, or LOS processing reports, all of the most integral parts of the business are combined into one "easy to analyze" location.

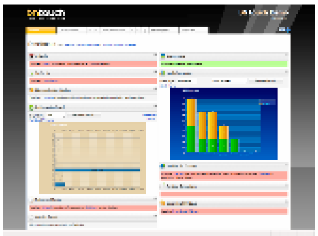
Problem Statement

Placing real-time information that is correct and functional seemed to be one of the most crucial hurdles in traditional database management. With the implementation of our BNTouch Dashboard we have created a way to overcome this hurdle as well as multiple other obstacles caused by loss of time and data.



Previous Options

- ✓ Search your Database
- ✓ Create Reports
- ✓ Manual Report Queries
- ✓ Query Database against Campaigns
- ✓ Take your time to do so much less



BNTouch Solution

At BNTouch we have always strived to get to the root of all problems that mortgage professional face and provide a solution. With the introduction of our BNTouch Dashboard we created a single place in our CRM which shows up-to-minute information from the entire database: leads, in-processing and funded clients. The dashboard is created to make sure BNTouch users will never lose a deal due to lack of communication.

Benefit 1

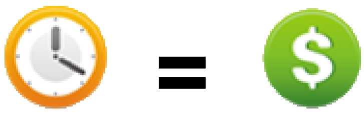
Having your alerts for new business opportunities at your fingertips in a second

Benefit 2

Uniformity and integrity of information is widening the throughput of your business

Benefit 3

Viewable and usable tracking reports that will help you gain more business and excel over your previous goals



Implementation

Simplicity is the best way to describe how to start using the BNTouch Dashboard. As it is with all BNTouch upgrades you just have to click on a single link to switch to our new dashboard and you're ready. Once you have selected the new dashboard you will have some of familiar features:

- ✓ Calendar
- ✓ Missed Tasks
- ✓ Pending Campaigns
- ✓ Assignments
- ✓ Activity Report
- ✓ To Do List

As well as these 5 new major components:

- ✓ In Processing Board
- ✓ Hot List Contacts
- ✓ Refinance Monitor
- ✓ Lead Conversion Panel
- ✓ Communication Monitor

These 5 new components are simple to use and integral to the day to day operation of a successful mortgage business.

In Processing Board

The **In Processing Board** gives you a real time look at your in processing pipeline as well as giving you a real time split on your files in various processing stages. With this information you can act on files that need the most attention.

Having the **In Processing Board** available to you will allow you to view your files while they move from application received to funding stages.

Within the **In Processing Board** you will have a couple of view options: numbers and amounts which will allow you to view the split of the loan in numbers and loan amounts respectively.

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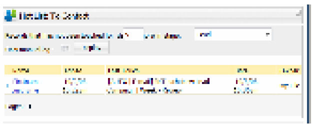
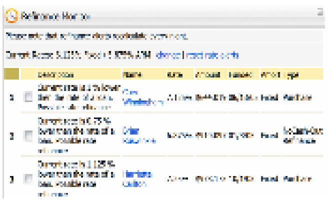


Hot List Contacts

The **Hot List Contacts** gives you a look at loans at various pipeline stages that have not been contacted for a selected period of time. With the **Hot List Contacts** you will be able to periodically stay in contact with your entire database.

You can choose the form of contact: campaign steps or manual log entries, and then select a day range. Once you set the criteria, touch base with the clients that appear in the report.

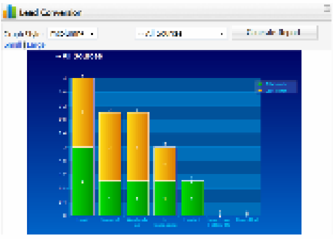
For example: every time you log into BNTouch you can see all prospects that have not been contacted for 5 days.



Refinance Monitor

Refinance Monitor shows you new refinance opportunities every time you log in! Refinance Monitor tracks 4 types of opportunities: Pre-payment expiration refinance, PMI refinance, Rate refinance and ARM expiration refinance. With this tool you will never miss an opportunity.

The **Refinance Monitor** is scrubbing your database automatically every night. You are able to change the parameters and rates by clicking “change” link by the rates.



Lead Conversion

Lead Conversion is a self monitoring tool that shows you the current month lead conversions and compares it to your last month. You can see total lead conversion or lead conversion by sources. Imagine being able to take all of your conversion data, find out where you are receiving your greatest ROI and maximize those efforts all in a matter of seconds. That ability is now in the **Lead Conversion** component.

Where are you gaining the most business? Where are you losing the most business? When you have the answer these questions you can maximize and focus your efforts in the areas that need it the most.

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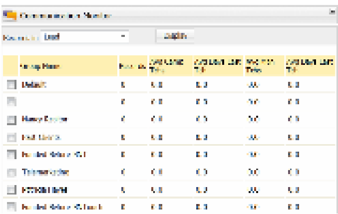

Communication Monitor

Communication Monitor tracks your communication activity split by group and marketing pipeline stage. This tool shows you your database at a glance.

With the **Communication Monitor** you are able to ensure consistent communication is always going out to selected groups in your database.

The biggest part of marketing for mortgage professional is to be in touch with entire client base. Select your pipeline stage, hit display and watch as BNTouch analyzes your database to ensure that everything is on track.

Communication Monitor shows you following statistics:

- ✓ Number of records in the group/stage
- ✓ Average number of manual log entries for this group/stage
- ✓ Average number of campaign steps executed for this group/stage
- ✓ Average time past from last log entry for this group/stage
- ✓ Average time past from last campaign step executed for this group/stage

Summary

It's simple. Having control of your database and saving time while you close more deals, was one of the biggest reasons behind this dashboard. No matter how large or small your company, the use of this dashboard to its fullest potential will allow you to have full command of your data. You will never miss an opportunity and you will know when, why and what is going out to your clients and how often.

BNTouch is the leader in marketing, sales force automation and technology. The BNTouch, web based CRM is redefining the successful way mortgage professionals conduct customer service, marketing automation and partner and client relationship management. Business as usual is now deemed by the CRM you use.

When it comes to getting you all the information that will help you succeed BNTouch will provide it.