

Planning.

Partnership.

Success.



## BNTouch Implementation Procedures

### We Succeed Where Others Fail

It may be hard to believe, but according to our most recent market research, over 50% of companies that purchase CRM never get the system implemented correctly. There are a lot of reasons why this will happen, but for a small to medium sized business, a failed implementation can severely impact the bottom line. At BNTouch, we work with you to first set mutual expectations as well as an implementation timeline, so we have benchmarks to gauge our success. You won't have to worry about costly delays, a lack of service, or working with consultants who have an incentive in drawing out the project.

### Common CRM Implementation Obstacles

Obstacle	Other CRMs	BNTouch
<b>Customization</b> You can only market effectively to your borrowers if you have the fields you need in your database.	Customization times can take up to months to include the fields and data you need to track and many systems require you to do the customization yourself or hire a third party consultant, leading to increased implementation times and higher expenses	BNTouch is mortgage specific. Your account comes complete with the fields you need based on your LOS software
<b>Marketing Materials</b> You can't start marketing until you have your marketing campaigns and sales letters in the system.	Require you to purchase third party content or provide your own	BNTouch comes complete with professionally written marketing content that's ready for use or customization

<p><b>Training</b> Ensuring that your employees know how to use the system properly is critical to gaining any benefit from a system.</p>	<p>Require you to purchase training through the company, a third party, or don't provide training at all</p>	<p>Includes live training 4 days a week with no additional charges along with support, videos, and training materials at <a href="http://www.crisuccess.com">www.crisuccess.com</a></p>
<p><b>Integration</b> Getting your existing data into a new system and being able to continually update your data is critical to being able to market effectively.</p>	<p>May require you to hire a consultant or buy additional software to integrate with your LOS</p>	<p>Comes complete with Calyx Point and Encompass integration, Fannie Mae File Integration, CSV file imports, XML integration and lead provider integration</p>
<p><b>Accountability</b> A lack of communication or accountability will undermine your implementation efforts and stall even the most well intended projects.</p>	<p>Depends on your willingness to hire the right consultant or maintain communication with their technical support department.</p>	<p>Our pro-active approach allows us to first set milestones, tie those implementation milestones to completion dates, and allows us to track your progress for you. Your assigned account manager will be responsible for working with you to ensure you are setup on time!</p>

**Best Practices / Proven Results**

We hear it again and again. A business knows they need to do something to increase revenue and the overall value of their business, they've heard of CRM and know it can produce the results they are looking for, but that's where they get stuck (and consequently why most CRMs are never implemented properly).

That's where we step in. Our dedicated staff has a wide range of experience- we have marketing experts, technology gurus, and a dedicated service team. We are here to guide you through your setup each step of the way and have a proven set of processes that will get your BNTouch account up and producing results in no time!