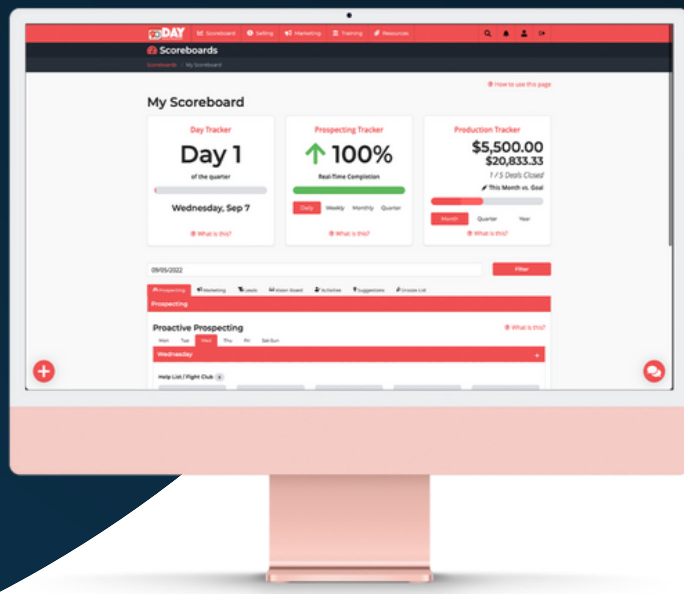
AccountableCRM

FOR MORTGAGE LOAN OFFICERS

Add accountability to your CRM in minutes. Imagine waking up everyday knowing who to contact in your mortgage business—and being accountable to doing it. Now you can!

We'll give your team daily prospecting and follow-up suggestions. The harder you work, the smarter we work for you.

Don't have a CRM but need one?
The perfect starter CRM. Robust isn't always best.



90 DAY SALES MANAGER

WHAT IS THE PURPOSE OF A CRM?

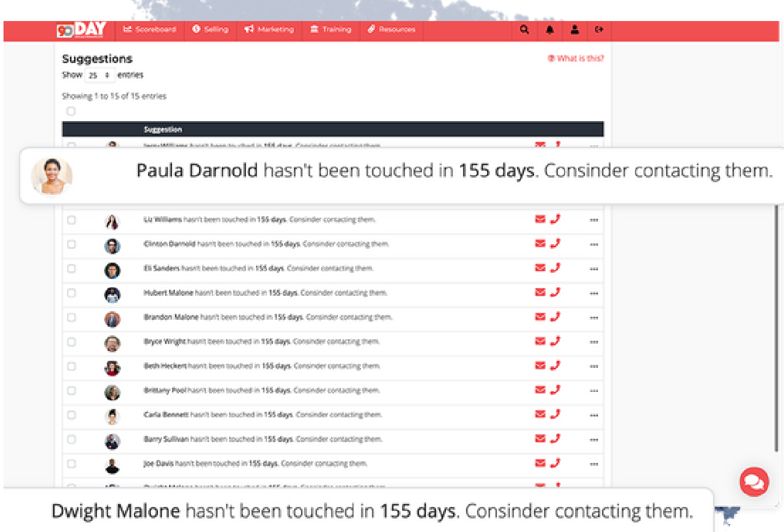
Nurturing relationships through three stages of client experience.

Pre-Process
Convert

In-Process
Educate

Post-Process
Engage

WHAT'S UNIQUE ABOUT OUR SOFTWARE?



Built-in Sales Accountability

- Set & hit goals 90-days at a time.
- Tied to a selling system.
- Manager dashboard & reports.

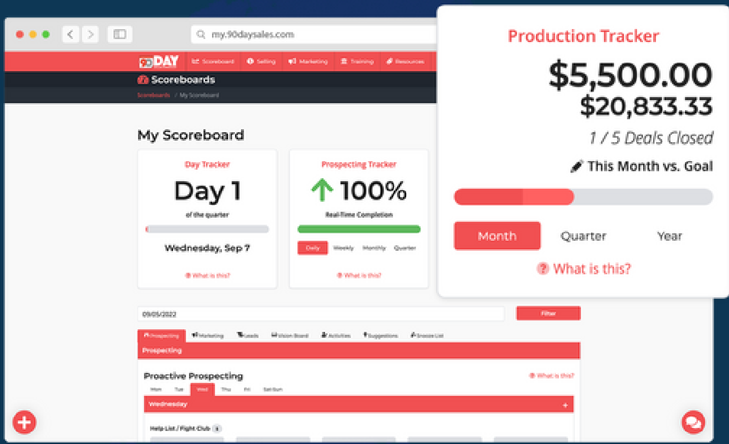
Built-in B2B Follow-Up

- Referral partner conversion system.
- "Dream 100" database management.
- AI suggestions for follow-up.

YOUR DATA IS SAFE AND SECURE

We can work with your LOS for member data (optional).

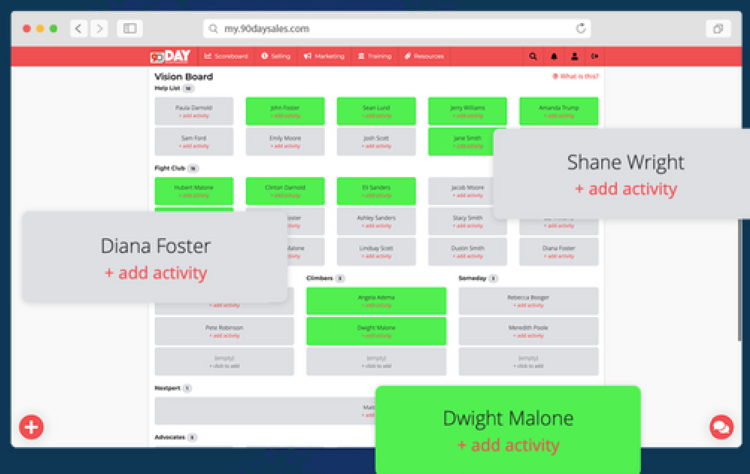
SALES FEATURES



Accountability

Be accountable for your sales activities and goals.

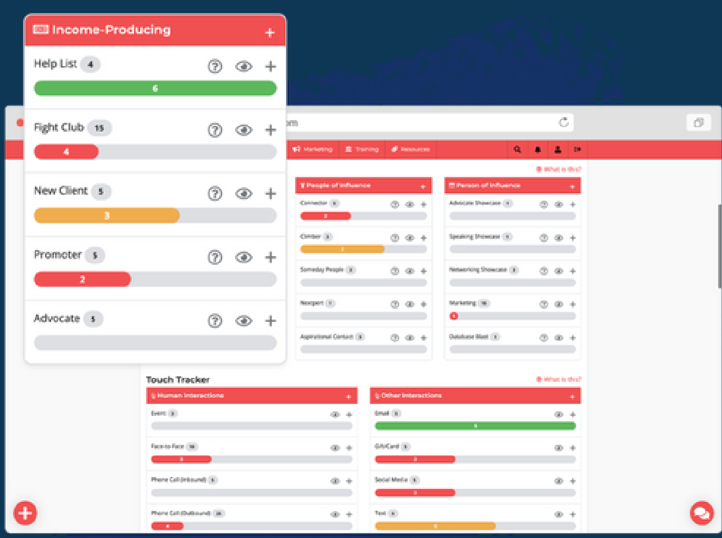
Through a gamified scoreboard, you'll set daily, weekly, and monthly benchmarks that will help you be accountable to reach your production goals.



Weekly Plan

Cast a vision for your sales activities each week.

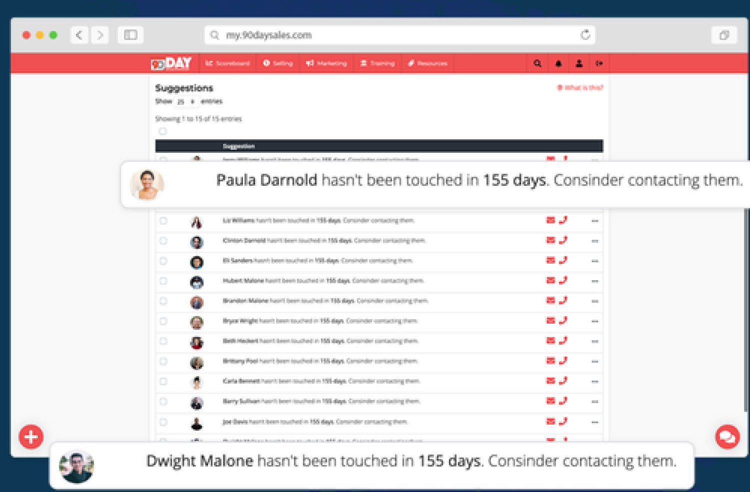
Start each week off on the right foot with a solid plan of who you are going to contact. And it's all tied to our 90-Day Selling System categories.



Reporting and Tracking

See where you've been and where you are going.

Get at-a-glance scoreboards and reports for all of your sales and marketing activities. And invite your sales manager to view your progress, too!

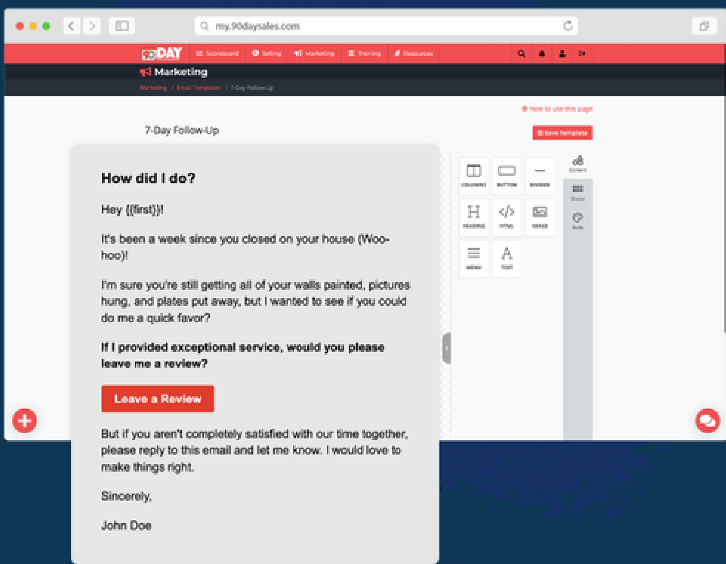


Artificial Intelligence

Know what to do, even when you don't.

No more stale communication! Let our artificial intelligence tell you when it's time to follow-up or reconnect with a customer.

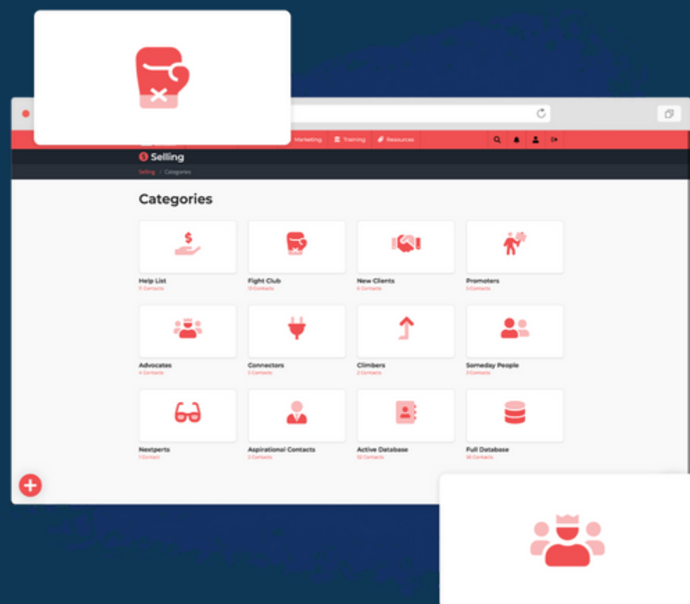
CONTACT FEATURES



Email & Automation

Communicate intentionally, but do it on autopilot.

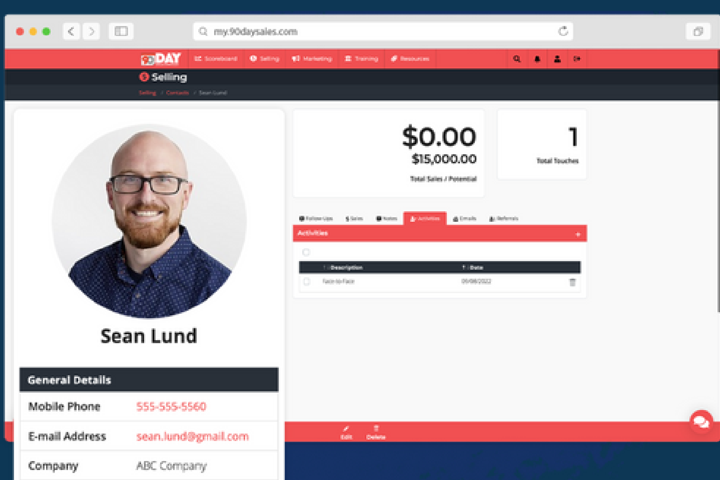
Create email campaigns and templates that can be sent on a schedule or automatically triggered when things happen within your CRM.



Pipeline Management

Track your customers through every step.

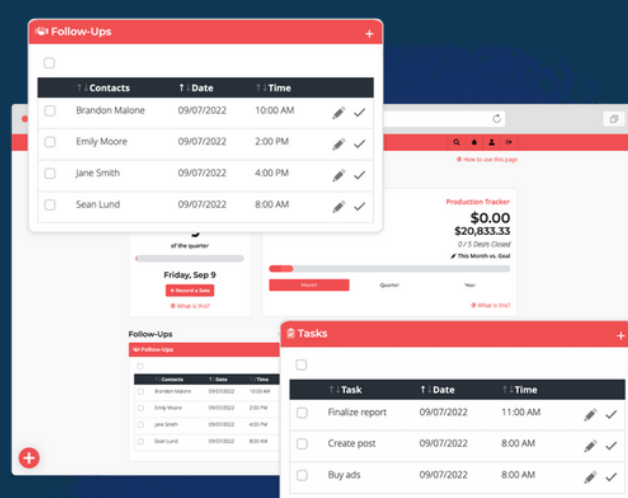
You'll always know where customers are in your sales pipeline. And our powerful selling system helps keep it all organized step-by-step.



Contact Management

Find everything about your customers in one place.

Make 90-Day Sales CRM your HQ for all customer information so you can find it in a snap! Create custom fields to record any data point you need.



Follow-ups & Tasks

Remember to do the important things.

Set follow-up reminders and create task lists so you never forget the things you committed to doing. And we truly believe the fortune is in the follow-up!

BONUS! WHAT ELSE IS INCLUDED?

LIVE KICKOFF WITH DR. BRUCE

Create your 90-Day Sales Plan in 90-Minutes. A proven selling system to increase the 3 P's of Production:

1. Performance
2. Productivity
3. Pipeline

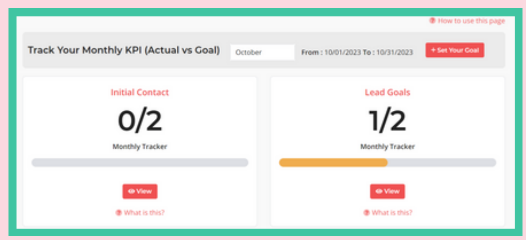
EMAIL TEMPLATES, AND SCRIPTS

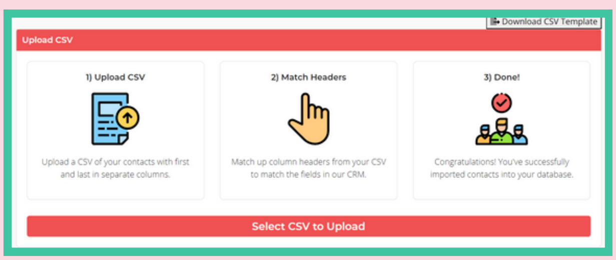
- Pre-built templates for all things pre-process, in-process, and post-process.
- Send emails and professional newsletters directly through our platform.

Setup Your Database *(As easy as 1... 2... 3... with no setup fees)*

1 Set Your KPIs

Quickly set your production goal and our calculator will auto-set your KPIs in seconds.



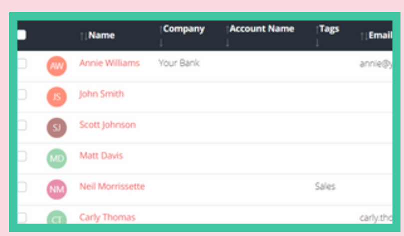


Import Contacts 2

Export your database from your existing CRM into a CSV file and import into ours. It takes just minutes.

3 Organize Contacts

Learn our selling system and then assign your active database into the correct selling system categories. Here's how.



WHAT PRODUCERS HAVE TO SAY...

My business has never been more organized, and our systems have never been more clear. This CRM keeps myself and our team more accountable, in a fun way.

Ian Bennett, Elevations Credit Union

highest purchase business year = $140M

I chose this program over many others because of the structure and systems it provides to help me be more efficient and accountable in the mortgage business.

Shelby Barrett, Canvas Credit Union

highest purchase business year = $60M