

# USHERPA

More Deals. Less Effort.



**THE FUTURE OF CRM IS RELATIONSHIP ENGAGEMENT**



*At Usherpa we understand how important it is for your business to build and maintain strong relationships with everyone in your network so that you are the go-to person people come to with financing needs. We also know that in order for you to become a trusted advisor, you need a tool that makes relationship engagement and automated marketing intuitive and simple.*

*We believe that engaging with your network should be simple and marketing solutions shouldn't be a distraction from your business.*

*And most importantly, we believe that you shouldn't have to stress for your success. Not only do we care about your success, we also guide you every step of the way. Which is why over the last 20 years we have been able to help tens of thousands of loan officers and hundreds of companies grow their business.*

*Here's how we help you look like a savvy marketing expert so you can spend your time doing what you do best - sell loans!*



**STRENGTHEN RELATIONSHIPS**



**STAY ORGANIZED**



**NEVER MISS AN OPPORTUNITY**

## TOP PRODUCERS USE USHERPA

// Since implementing Usherpa's Essential Blueprint for Success strategies, I've taken four applications from birthday phone calls alone.

-DAVID L.

// I've already gotten two new agents from the Usherpa Local Housing Videos!

-HANNAH W.

// Usherpa has clearly helped generate more business compared to last year.

-CAY S.

// I have been able to easily generate call lists targeting specific client groups, which resulted in several applications.

-DAVE K.

// In just this week I got two repeat deals because of Usherpa!

-MICHELLE W.

// I am so pleased with the Usherpa Essential Blueprint for Success program. It's saved me tons and tons of time. I get a lot of call backs from people I haven't talked to in a long, long time. I know Usherpa is the reason.

-TAMI B.

## USHERPA MEMBERS EXPERIENCE

46%

MORE PROSPECTS CONVERT

2X

MORE DEALS CLOSE

57%

MORE CUSTOMERS REPEAT



### ESSENTIAL BLUEPRINT FOR SUCCESS

- ① 90 Day Free New Member Engagement Program
- ① Advanced Relationship Engagement Sessions



### CONTENT THAT CONNECTS

- ① Localized Content
- ① Cutting Edge Video Content



### BEST BORROWER EXPERIENCE

- ① Custom Borrower Loan In-Process Experience
- ① Loan Mining Tools With Rate Alerts
- ① Automated Closing Gifts



### TECH INTEGRATIONS

- ① 2 Way Blend Prospect Capture System
- ① Encompass Integration

# UNIQUELY USHERPA



### INTUITIVE TASK & DATABASE SYSTEM

- ① Task Management Workflow
- ① Customizable Database Management Functionality



### WINNING CO-BRANDING

- ① Co-Branded Single Property Open House Websites
- ① Co-Branded Open House Flyers
- ① Co-Branded Automated Marketing Campaigns



### MORE THAN EMAIL

- ① Text Message Marketing
- ① Social Media Marketing
- ① Direct Mail Marketing



### AUTOMATED MARKETING

- ① Targeted Prospect Content
- ① Targeted Lead Content
- ① Direct Mail Campaigns
- ① Lifetime Client Campaigns
- ① Realtor Acquisition Content

# EMAIL CAMPAIGNS



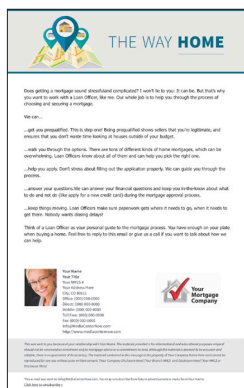
## FOR REFERRAL PARTNERS ...

- **Inside Lending:** Weekly featuring key information about the economy, housing trends and more
- **Essential Hacks:** Business tips and tricks delivered monthly to help your partners' businesses grow
- **Interactive Rate & Housing Charts:** Showcase rates and housing trends to agent's potential buyers
- **Local Housing Video\*:** Monthly eye-catching video featuring housing statistics specific to your region
- **Local Eyes\*:** Interactive e-mag about all kinds of fun activities, entertainment, and local events in your area
- **Client Birthday & Closing Anniversary Reminders:** Your partners are reminded of your mutual client's birthdays and closing anniversaries



## FOR LEADS ...

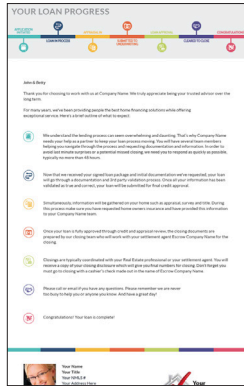
- **Lead Nurturing:** Designed to begin the conversation with people you do not know. These Leads will receive monthly Home & Wealth and Holiday/Seasonal emails
- **First Time Homebuyer:** 5 bi-weekly emails with content targeted for this type of buyer, plus monthly Home & Wealth, and Holiday/Seasonal emails
- **Relationship Builder:** 10 bi-weekly emails meant to help you start building relationships with leads who you have never talked to, plus monthly Home & Wealth, and Holiday/Seasonal emails



## FOR PROSPECTS ...

- **Nurturing:** For prospects with whom you've spoken, but are unsure of their time frame or interest in buying or refinancing. They will receive: Home & Wealth, Holiday/Seasonal and Birthday emails
- **Actively Looking:** 12 week email campaign called "The Way Home" sent during the critical home-shopping period, plus monthly Home & Wealth, Holiday/Seasonal, and Birthday emails
- **First Time Homebuyer:** 5 bi-weekly emails with content targeted for this type of buyer, plus monthly Home and Wealth, Holiday/Seasonal and Birthday emails
- **Credit Challenged:** 12 monthly Credit Repair emails titled "Homeward," plus monthly Home & Wealth, Holiday/Seasonal, and Birthday emails

# EMAIL CAMPAIGNS



## IN-PROCESS ...

- **In-Process Milestones:** Customizable updates to keep borrowers and agents informed throughout the purchase. With an LOS integration, this campaign can include emails, videos, and text messages



## FOR CLIENTS ...

- **Home & Wealth:** Monthly informative newsletter positioning you as a trusted advisor
- **Holiday Emails:** 20 beautiful emails sent on national and seasonal holidays
- **Time Change Reminders:** Helping your clients remember to change their clocks twice a year
- **Happy Birthday Email:** Personal email letting your client know you are thinking of them
- **Mortgage Check-Up:** Sent on home loan anniversaries
- **Local Housing Video\*:** Monthly eye-catching video featuring housing statistics specific to your region
- **LocalEyes Email\*:** Interactive e-mag about all kinds of fun activities, entertainment, and local events in your area

# LAUNCH PAD - ONE-STOP MARKETING PORTAL

How difficult is it to produce compliant marketing that is targeted, localized, and customizable, while meeting your Loan Officer's deadlines? Usherpa's Launch Pad Custom Email Wizard was designed for corporate marketing teams and allows marketers to create materials that align with your unique company vision and brand strategies.

Why switch between multiple systems to build content on demand when you can seamlessly design email campaigns within Usherpa CRM?

Launch Pad is your one-stop shop to getting the right messages out at the right time— whether it's a Lunch and Learn invitation for an individual LO, a company-wide, targeted drip campaign, or internal messaging. Effortlessly build a library of collateral that is directly linked to Loan Officers' databases and Loan Origination System.



Power search across all LO databases to set filters on recipients



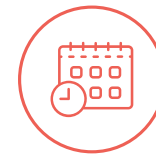
Use as an internal communication tool



Send embedded video/ images within the HTML emails



Save your Power Searches so the filters are always remembered and will pull in the most recent data with a click



Schedule on demand, multiple times, or a series based on your own business rules

# MASTER ASCENT PLAN

Usherpa's MAP for your success







# BASECAMP



## ON-BOARDING

Individual Welcome Call and training for all new LOs to get the set up correctly right away.

## WEEKLY TRAINING WEBINARS

Gives all LOs the opportunity to learn the basics to get comfortable with the system.

## CUSTOM LMS SYSTEM

A new system with a ton of videos tutorials and other helpful items that can be tracked by Branch Mangers to make sure they completed the necessary training.



# SUMMIT SERIES



## ADVANCED WEBINARS

Bi-weekly webinars that take the LOs through more advanced training.

## STRATEGIES FOR SUCCESS

Targeted money-making strategies.

# USHERPA

More Deals. Less Effort.

*Are you tired of losing leads?*

*How much longer do you want to play catch-up with technology?*

*How many relationships are you willing to lose because you haven't stayed in touch?*



**STRENGTHEN RELATIONSHIPS**



**STAY ORGANIZED**



**NEVER MISS AN OPPORTUNITY**

***SCHEDULE A DEMO TODAY***

303.740.5710 | [USHERPA.COM](https://www.usherpa.com)