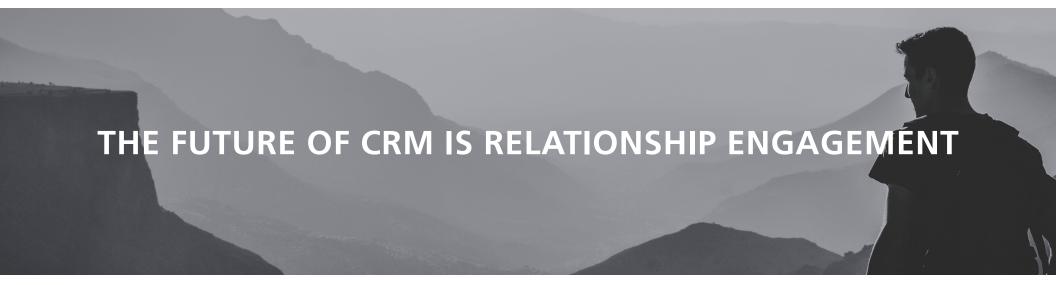
## USHERPA

More Deals. Less Effort.





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 I've already gotten two new agents Usherpa has clearly helped Essential Blueprint for Success from the Usherpa Local Housing generate more business compared strategies, l've taken Videos! four to last year. applications from birthday phone calls alone. -HANNAH W. -CAY S. -DAVID L. I have been able to easily generate I am so pleased with the Usherpa In just this week I got two repeat call lists targeting specific client deals because of Usherpa! Essential Blueprint for Success groups, which resulted in several program. It's saved me tons and applications. -MICHELLE W. 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 -DAVE K. is the reason. -TAMI B.

#### **USHERPA MEMBERS EXPERIENCE**





#### ESSENTIAL BLUEPRINT FOR SUCCESS

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



#### CONTENT THAT CONNECTS

Localized ContentCutting Edge Video Content



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



#### TECH INTEGRATIONS

- 2 Way Blend Prospect Capture System
- Encompass Integration

# UNIQUELY USHERPA



#### INTUITIVE TASK & DATABASE SYSTEM

- Task Management Workflow
- Customizable Database
  Management Functionality



#### WINNING CO-BRANDING

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



#### **MORE THAN EMAIL**

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



#### AUTOMATED MARKETING

- Targeted Prospect Content
- Targeted Lead Content
- Direct Mail Campaigns
- Lifetime Client Campaigns
- 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

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stop sikking mo daunting, partic	I have you sport padding your landiorit's pockets? Probably enough that you're ready to eavy into rent and instead leveral in your own terms. But buying your first home can be aliarly if you're worked about money, or cantaed about the complex homebuying pro- you need to find a Lanc Officer you can trust to agait, you through the process.
We believe ever people just like	yone deserves the home of their droams, which is why we've helped thousands of you into their first homes. Him's how we do it:
We prequality	yee, so you know exactly what you can afford.
We educate y	No, so you can navigate the homebuying process with ease.
We stay in too	dh every step of the way to make sure everything goes smoothly.
	thome can be scary and stressful — but it doesn't have to be. Reply to this email when talk about how we can help you start building for your future.
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#### 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**

5	
Jaho S P	<b>bery</b> on the choosing to each with us at Constant-Youne. We took appreciate being your trutted about over the
long ter	
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2	Now their net received your signed lives package and initial documentations we've requested, your lives with go through a documentations and large any validations process. Once all your information has been validated as from and served, your bannelities udenticed for final credit approval.
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•	Once your taxe is fully approved through oved and approximences, the occurs documents are prepared by our closing team whe will work with your settlement agent Excess Company Name for the occurs.
3	Coming any hypothy considerated with yow Real Edular professional or your settlement agent. You will remove a copy if your closing disclosure which will give you have numbers for closing. Disn't heget you met gets closing with a cathier's check made out in the same of Escrew Company Name.
•	Phase call or email if yos have any questions, Phase remember we are never too bury to help you or anyone you know. And have a great day!
	Congratulations! Your lease is compated

#### **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

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



**Essentials to Your Ascent** 

**USHERPA.COM** 



## 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.

**USHERPA.COM** 



## **SUMMIT SERIES**



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

### STRATEGIES FOR SUCCESS

Targeted money-making strategies.



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