

OptifiNow TPO

CRM & Marketing Platform for Wholesale Lending

The Only Wholesale & TPO CRM Solution

The industry's only CRM designed to meet the unique needs of wholesale and correspondent lenders.

"We knew we could rely on OptifiNow to build a platform that worked the way we wanted to work.

We gave them our data, configuration requirements and integrations. OptifiNow took care of everything else."

Carl Markman

Director of National Sales
REMN Wholesale

Wholesale Lenders Deserve a Better CRM

For too long, Wholesale and TPO lenders have put up with CRM systems that are not specifically designed for their unique business model. They've put up with big name, generic CRMs that are overpriced and under deliver, or forced to inappropriately use a retail CRM.

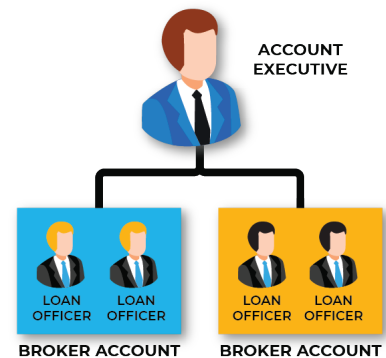
OptifiNow TPO is the only CRM that truly understands how wholesale lenders operate and delivers an out-of-the-box solution that can be implemented in 30 days.

B2B Database Structure

OptifiNowTPO's database is built using a business-to-business model that is essential for wholesale lenders.

The B2B model enables efficient categorization and filtering of broker accounts, allowing OptifiNow TPO to automatically identify problem accounts.

All contacts associated with a broker account are automatically assigned to an Account Executive, instantly updating contacts when assignments are changed and ensuring that marketing is attributed to the right AE.

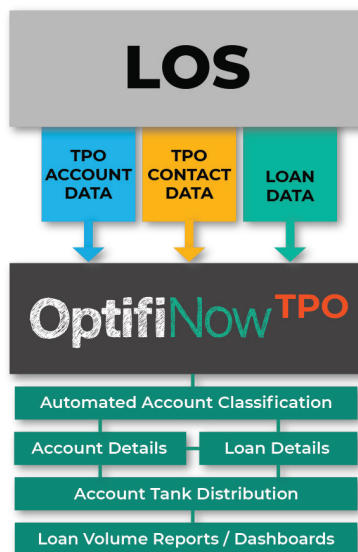


Advanced LOS Integrations

Loan Origination System (LOS) integration is a strength of OptifiNow TPO because it drives multiple features in the CRM.

OptifiNow TPO integrates broker account, broker user and loan production data that is stored in the LOS. This ensures that all approved broker information is synchronized and up-to-date in the CRM and provides Account Executives with easy access to critical account information.

Loan production data is used to track the status of individual loans as well as volume totals for every account and loan officer. Loan submission dates associated with each loan is used to drive Automated Account Classification, an exclusive feature of OptifiNow TPO that significantly enhances account management.



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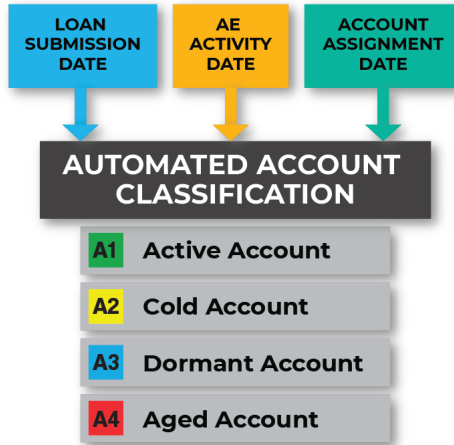
CRM & Marketing Platform for Wholesale Lending

"OptifiNow didn't give us vaporware or promises to support wholesale lending. They already had a CRM that was specifically built for wholesale lending. The features and integrations we saw demonstrated a deep understanding of wholesale sales and marketing operations. OptifiNow was the obvious choice for us."

Garrett Finkelstein
Vice President of Marketing
Benchmark Mortgage

Automated Account Classification

Automated Account Classification guides your Account Executives and lets them know when to engage with their accounts using custom rules. OptifiNow TPO builds custom rules for lenders that dynamically change classification labels to



indicate whether an account needs attention from an Account Executive.

Typically, LOS loan data is used to gauge loan submission dormancy, but other data such as Account Executive activity, assignment date and other indicators can be used to create Account Classification rules.

Automated Account Classification streamlines account management and ensures sales resources are focused on the maximum number of accounts available.

Additional Features and Benefits

Feature	Benefit
Account Management	Easily assign and reassign accounts to Account Executives. View a pipeline of accounts and use Account Classification to focus sales resources.
Contact Management	Manage individual loan officers and track engagement activities, schedule appointments, and jot down notes.
Built-In Email and SMS Marketing	Easily send personalized marketing campaigns that feature both email and SMS messages. Send and receive direct SMS messages. Create custom emails on the fly.
Marketing Store	Provide a centralized, online resource to easily distribute personalized marketing materials to Account Executives.
Rate Sheet Management	Automatically email rate sheets to a targeted list of contacts. Optional method to directly upload rate sheet and trigger rate sheet campaign. Send rate sheet campaign on demand to accommodate intraday price changes.
Event Uploader with Custom Tags	Upload contact lists and send marketing only to tagged attendees. Waterfall de-duplication process ensures a clean database of accounts and contacts.
API Integrations	Integrate LOS, pricing engines, website forms and other external systems to manage data bi-directionally and enhance data analytics.
Business Intelligence	Create reports and dashboards to gain insight on your wholesale business performance.



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OptifiNow White Glove Service

OptifiNow's White Glove Service provides a level of support that is simply unmatched by other CRM vendors. OptifiNow implements and manages the platform on a daily basis for clients, handling routine tasks and complex custom development projects. Our White Glove Service ensures that wholesale lenders are using a CRM that is effective and responds to their needs over time.