

Features.

Benefits.

Values.



Results Oriented Features

BNTouch Mortgage is a web based mortgage specific sales and marketing system. The features found in BNTouch represent the culmination of years of experience and over 1,000 implementations. The end result is a system that's built around the best practices of top producing mortgage offices from across the country. By focusing on revenue generating features and practices, BNTouch users are able to avoid the common pitfalls of CRM implementation and generate a positive ROI faster than with conventional CRM programs.

Organization

Borrowers / Partners / Pipeline

Sounds simple, right? Organize your database and you're set to go. But the truth is that the right type of organization is critical to your sales and marketing efforts. Storing your information the wrong way will undermine your marketing efforts and ensure that you're not following up the way you should.

In BNTouch, we make organizing your database easy. The system contains separate databases for your borrowers and partners that are built around sales pipelines that represent the best practices for mortgage sales and referral generation. Unlike other systems that bog you down and confuse you with layers upon layers of forms and dispositions, we take a visual approach with an interface that is intuitive and easy to use.

At BNTouch, we approach mortgage sales with the view that everyone you know is a potential borrower, a potential referral source, and hopefully both. But the truth is that you won't get the loan or the referral if you aren't consistently communicating, and you won't communicate if you can't find those people in your database. To overcome this problem, we've created a place for everyone in BNTouch from your prized real estate agents, to your dear aunt Martha by creating mortgage specific sales and partnership pipelines. Your leads go in your leads pipeline, your funded loans in your funded pipeline, and we even have a place for Martha.

On top of that, our integrated search functionality allows you to do some serious data mining and opportunity discovering- you can search based on any field or combination of fields in BNTouch, you can save those searches, export them as reports, and even save your searches for later. So the next time rates drop, you'll know exactly who to tell.

Automation

Marketing Campaigns / Triggers / Process Automation



Organization is essential, but it's only essential if you're going to do something with the data. That's where our intelligent marketing engine steps in. With BNTouch, you're armed with a sophisticated engine that's smart enough to read your client information and determine which campaign that person needs to be placed on. And when we say it's intelligent, we really mean it. Every time you add or update information in BNTouch, our marketing engine takes a look at that information and then determines if that person now needs to be added to a campaign or removed from a campaign.

We help you implement the marketing campaigns and even provide you with campaigns that are proven to work, you just smooth out the edges to fit your niche and style, and you're marketing!

With BNTouch, you won't have to worry about your LOs forgetting to send those follow up emails, the system will send them for you. Your direct mail will be prepared and ready to print on the day it's supposed to be mailed, and we'll tell you when to make those follow up calls. Let your LOs focus on what they do best by generating new business and working the loans, we'll make sure they follow your internal processes and generate more business by doing the grunt work.

Centralization

Oversight / Defined Processes / Reporting

-  Are you struggling to implement a best of breed sales process for your LOs to follow?
-  Do you have a couple of top producers that are really bringing in the business and wish the rest of your team would follow suit?


At BNTouch, you can manage the marketing, fulfillment, and achieve overall accountability with our marketing accounts. These accounts give you global access to every contact record in your office, let you set marketing triggers globally from a single account, and generate reports. Now you can implement your desired loan process directly into the marketing account and every LO in your office will be able to follow it because BNTouch will be doing most of the work for them.

The marketing pieces will still go out from that particular LO with their email, photo, logo, etc., but you'll have full control over what pieces go out, when they go out, and you won't have to rely on your LOs to do their follow up. Whether you want to send birthday cards, check in letters, or multi step campaigns that span the course of several years, we make it easy.

The marketing account will also give you global oversight as to who is using BNTouch, what they are doing in the system, and how effective they are at converting leads and marketing.

Integration

Leads / LOS / Websites

 Want to kill any benefits you were hoping to attain with your CRM? There's a quick and easy to do that, it's called double entry.

Make your LOs double enter their leads, files, or contacts and there's a good chance they'll find a reason not to.

But that's the catch: your marketing initiatives are only as good as your data your data is only as good as you make it.

At BNTouch, we get that, so we've worked hard to make updating the system easy. We have two way sync agents with both Calyx Point and Encompass, we can accept your leads by XML posting (we're already integrated with most of the major providers), we can import data in csv format, and we can integrate your existing website with our system.

Each time you update your LOS, we'll automatically update that client's information in BNTouch. Instead of receiving new leads by email, post them to BNTouch and get them started on your new lead campaign automatically. You can even use BNTouch to partner with your real estate agents and referral partners by giving them a secure way to enter their leads into your BNTouch account so you can market on their behalf.

Lead Generation

Marketing / Websites / Referrals

Anyone can buy a lead. Buying leads is easy. But generating your own leads creates value and allows you to grow your business over the long term.

With BNTouch, we will provide each of your LOs with their own website that they can build right from their account. We host it for them, and integrating it with their BNTouch account is easy.

Your LOs all get the opportunity to participate on BestInMortgage.com, our lead generation portal where we put you in contact with people in your area who need help with a mortgage.

We even provide referral generating tools such as our monthly newsletter that we write and brand with your identity and our co-branded marketing and partner campaigns that will bring realtors knocking at your door!

With BNTouch, the value is clear- you can spend a comparable sum of money each month placing an ad in the local paper, purchasing a couple of leads, or buying 'coaching' materials, or you can arm your LOs with a tool that will allow them to create their own businesses that grow over time.

Training and Implementation

Training / Content / Support

- ! Double entry can kill your CRM project, but most CRM aspirations fail long before that because the systems are never implemented properly.

BNTouch is different. Yeah, we know, everyone says that, but it's true. From the moment you join BNTouch, we're there to partner with you to ensure that the system is implemented properly, your employees understand how to use it, and that it's configured to generate revenue.

At BNTouch, we'll present you with a well defined plan where we'll go step by step through setting up your system, providing recommendations along the way, and explaining what we are doing as we go.

Once your system is configured, we'll work with you to import your data, install the sync agents, and trigger the marketing campaigns so that you're armed and dangerous.

And when it comes to training, you better believe we've got it. We provide live trainings 4 days a week and we are always happy to schedule private trainings for your office.

But it doesn't stop there, we provide continual training, support, and content via our support / marketing portal online at www.crisuccess.com

**For An Exhaustive Feature List
Visit Us Online at**

www.bntouchmortgage.com

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