

MORTGAGE CRM COMPARISON

Important Features & Benefits

**MyCRM
Dashboard**

Powered by:
Continuity Programs

Customer suitability (individual LO/small teams vs. enterprise)	Enterprise
Pricing	\$\$\$
Loan officer marketing level of effort (1 easiest -10 most difficult)	1
Complimentary administrator access	✓
Turnkey automation (no full-time administrator needed)	✓
SOC Compliant	✓
Easy to setup and use	✓
LOS/API integration	✓
Dedicated Account Manager and customer service team	✓
Robust reporting and analytics with real-time dashboard	✓
Automated email marketing campaigns	✓
Relevant messaging to keep in touch with prospects, customers, & referral partners	✓
In-process marketing when loan milestones are reached	✓
Personalized direct mail integrated	✓
Alerts when a contact lists their home	✓
Credit pull alerts	✓
Real-time exclusive mortgage lead generation with email alerts	✓
Built in PURLs (personalized web pages) for lead generation	✓
Mortgage websites	✓
Generates testimonials with automatic social media sharing	✓
Online reputation management	✓
Customer satisfaction surveys with NPS scoring	✓
Variable designs with names personalized into the images	✓
Access to online store with mortgage specific mailings, rate sheets, open house flyers, emails & much more	✓
White labeled marketing hub with corporate approved designs for brand protection	✓
SMS text messaging	✓