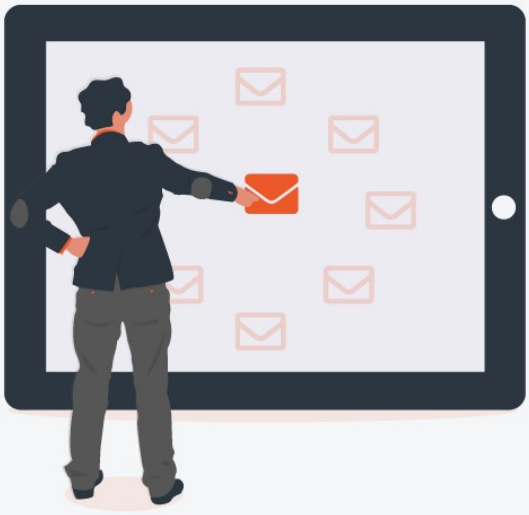
10 Ways Mortgage Brokers Use Automation to 10X Lead Generation

If you're in the mortgage business, generating and nurturing leads is critical, and there are several ways you can streamline your processes to make your efforts even more effective. Skip the manual work and adopt automation with these 10 simple steps to 10X lead generation. Use and/or download the free checklist, or share it with your IT consultant.



- [ ] Invest in an industry-specific Customer Relationship Management system (CRM) like Velocify, Surefire or Whiteboard.
- [ ] Set up web forms to auto-populate as leads in your CRM.
- [ ] Use email parsing software like Mailparser to make sure leads that come in from email make it into your CRM, too.
    - [ ] You can also extract important data, like APR and closing date and add them to your email marketing system.
- [ ] Automate lead distribution to your team to make sure every lead is assigned.
- [ ] Set up email auto-responders to acknowledge new leads immediately and let customers know what to expect next. Response time is a major differentiator in acquiring a new customer.
- [ ] Set up retargeting ad campaigns to automatically follow up with web visitors who didn't complete a lead form.
- [ ] Create automated email campaigns for leads in all of your major sales flows (new home loan, first time home buyer, refinance, real estate investor, etc).
- [ ] Automatically stop email marketing when a customer enters the loan process to ensure your Loan Officers are driving all communications during an active loan.
- [ ] Automate refinance email campaigns based on loan APR and closing date.
- [ ] Set up on-demand webinars using a tool like WebinarNinja so you can educate lots of customers on specific topics without spending hours with each one.

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