

INTEGRATION GUIDE



Mortgage Coach Solution

Performance

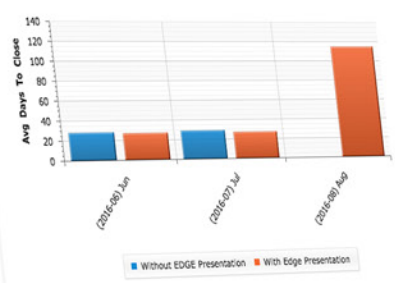
Mortgage Coach Connect

toggle site navigation

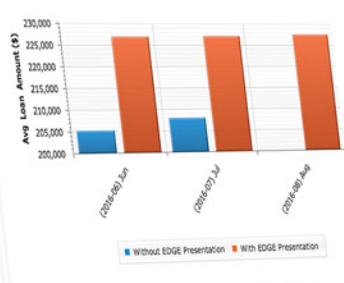
MCS - Performance



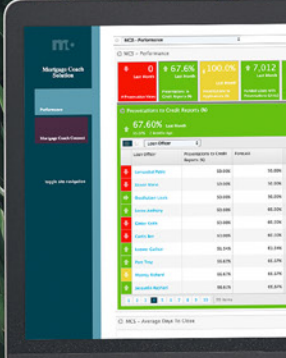
MCS - Average Days To Close



MCS - Average Loan Amount



MCS - Last Month Views By Device Type







HIGHLIGHTS OF THE **m**•MOTIVITY INTEGRATION

CHOOSE YOUR METRIC

- Presentation views (#)
- Presentation to credit reports (%)
- Presentations to applications (%)
- Funded loans with presentations (Units)
- Funded loans with presentations (%)

EVALUATE YOUR STATS AT-A-GLANCE

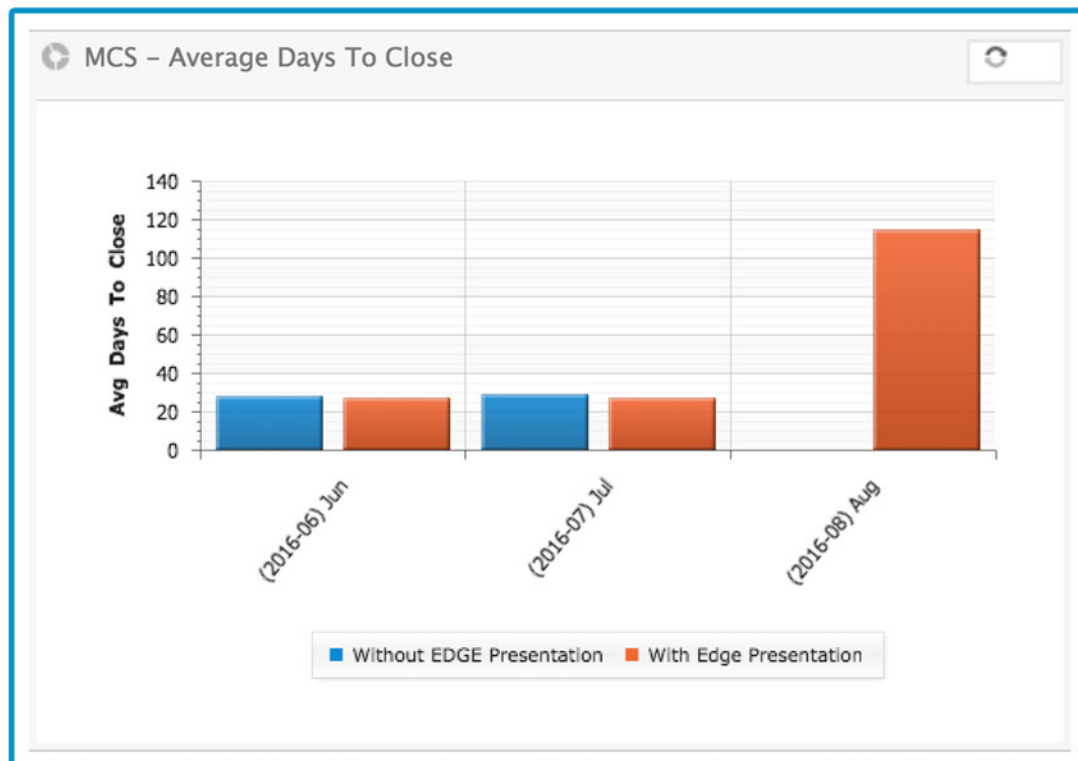
-  • Percentage changes
-  • Forecast growth or drops
-  • Ranks
-  • View goals



HOW TO READ & USE THE MOTIVITY INTEGRATION

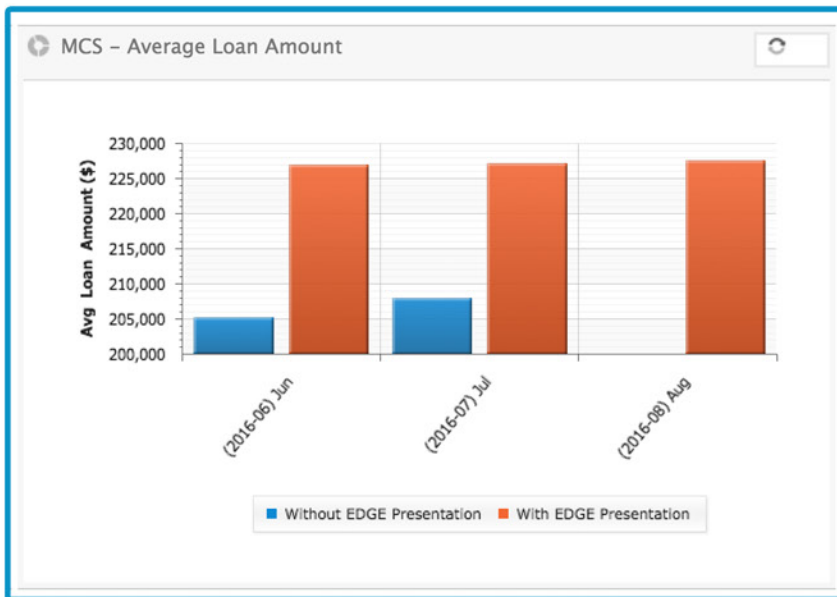
ON THE FRONT PAGE

There are 3 graphs:



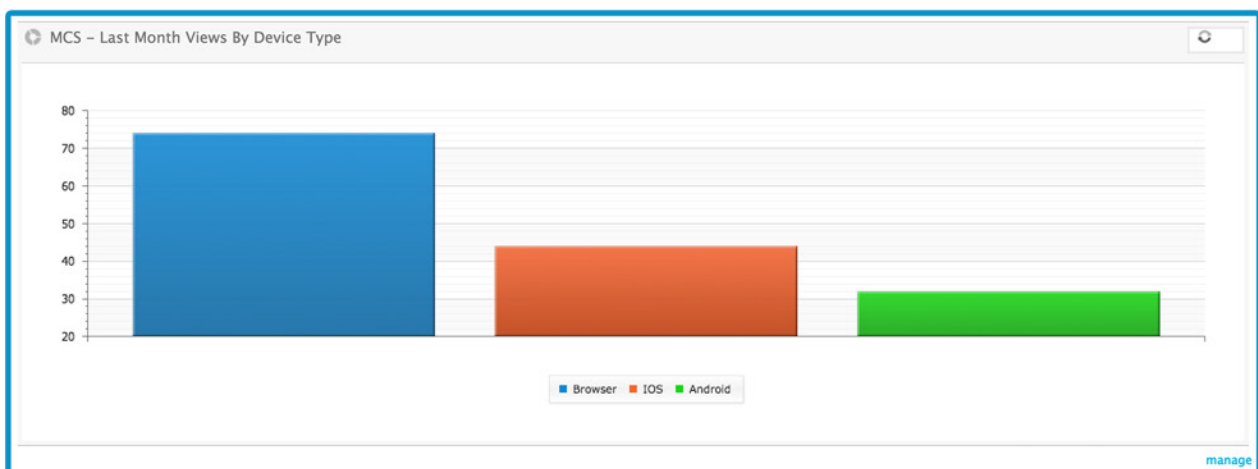
AVERAGE DAYS TO CLOSE

As you begin to integrate the Mortgage Coach Total Cost Analysis into your presentations, you should start to see clients committing to a mortgage decision faster, and as a result, the average number of days to close should go down. This chart will help you monitor your average days to close on a daily basis to ensure that the number of clients receiving a TCA is growing and your average number of days to close is shrinking. This measurement also can be used to monitor long-term marketing. A lesser number of average days would mean you are successfully reaching and nurturing your audience in a more effective time span.



AVERAGE LOAN AMOUNT

Borrowers who are presented with all their options and are given the opportunity to make an educated and informed mortgage decision tend to go with a higher loan amount than those being presented only price. With this chart, you'll be able to monitor and track the most successful options, measure loan growth over time, and make a strong presentation against price as the only factor in a loan decision.

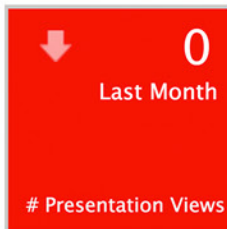


LAST MONTH VIEWS BY DEVICE TYPE

Mortgage and home-buying decisions often can't wait. With Mortgage Coach's mobile apps, you will be able to provide clients with documents and communications anytime, anywhere. This ability has a direct effect on reducing time to close, so monitoring this chart can help ensure your team is using mobility as a competitive advantage. If these mobile numbers aren't growing the way you want them to, you can then get your team members the specific Mortgage Coach training they need to connect better with their customers.

ON THE FRONT PAGE

There are 5 metrics:



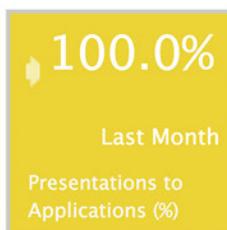
PRESENTATION VIEWS (UNITS)

Understanding the total number of unique Total Cost Analysis presentations viewed will enable you to ensure the savings and content presented is resulting in upward trends. You should see an average of 2.5 times the total number of presentations created monthly if the TCA is being shared as intended.



PRESENTATION TO CREDIT REPORTS (%)

When implementing best practices to ensure consistent borrower experiences, the percentage of presentations to credit reports should be, ideally, 100% or more. If the borrower appears currently not fundable, even if they appear currently not fundable, you should ensure your brand is present on their mobile device to be able to reach that prospect effectively, now and in the future, as well as demonstrate a superior experience for their circle of influence.



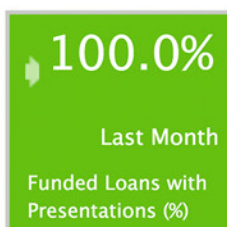
PRESENTATIONS TO APPLICATIONS (%)

To achieve total transparency for every client, the percentage of presentations to applications should be 100% always. Simple integrations, automation, and additional reporting are available to audit and ensure every application includes an accurate Total Cost Analysis.



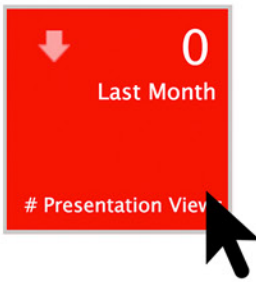
FUNDED LOANS WITH PRESENTATIONS (UNITS)

Trending the number of funded units with a presentation illustrates the expected increase in client-specific opportunity to manage a client-for-life relationship and influence additional referrals and transactions with a periodic mortgage review.

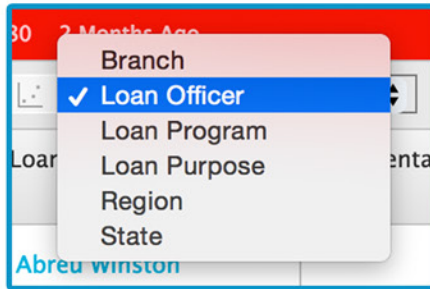


FUNDED LOANS WITH PRESENTATIONS (%)

Funded Loans without a presentation are a missed opportunity to retain your influence post-closing. 100% of your funded clients should have your best advice available anytime. Presentations delivered are available and saved on a client's favorite device indefinitely, allowing you to reach them when it matters most.



CLICK ON A METRIC



VIEW YOUR STATS

according to a variety of organizational categories: **BRANCH, LOAN OFFICER, LOAN PROGRAM, LOAN PURPOSE, REGION, OR STATE.**

Loan Officer	# Presentation Views	Forecast	Rank	Goal	% Goal	Previous # Presentation Views	Growth	
Cejka Alex	0		10	1	1	0%	1	-100%
Chamberlain Joba	0		5	1	0	0%	0	0%
Compton Erik	1		10	1	13	0%	13	-97%
Concha Carlos	0		5	1	3	0%	3	-100%
Coutlangus Jonathan	7		5	1	0	0%	0	140%
Cranford Jeffrey	11		5	1	0	0%	0	110%

COMPARE HOW EACH ARE DOING

in each set of data: **# OF PRESENTATION VIEWS, FORECAST, RANK, GOAL, % GOAL, PREVIOUS # PRESENTATION VIEWS, AND GROWTH.**

MCS - Main

Loan Officer: German Franklyn | Analysis Created: between 8/1/2016 and 8/31/2016 | Query Filter: Report View Count Not Blank

filter 4 results

Borrower Name	Loan Number	Analysis ID	Branch	Loan Officer	Loan Amount	Credit Pulled Date	Application Date	Edge Browser Views	Edge Android Views	Edge IOS View	Total Views	Funding Date
Borrower5015706	5008902.971	1034550	Billings	German Franklyn	398,624	06/27/2016	06/30/2016		6	10	16	07/31/2016
Borrower5017072	5009674.432	1027915	Jackson	German Franklyn	431,674	06/23/2016	06/26/2016		3	5	8	07/27/2016
Borrower5017206	5009750.11		Wichita Falls	German Franklyn	434,916	06/27/2016	06/30/2016		0	7	7	07/31/2016
Borrower5017222	5009759.146	1039964	Sandy Springs	German Franklyn	435,303	06/23/2016	06/26/2016		11	21	32	07/27/2016

DRILL DOWN TO THE DETAILS

by clicking on the name, state, program, etc.