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
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.
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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.

COMPARE HOW EACH ARE DOING
in each set of data: # OF PRESENTATION VIEWS, FORECAST, RANK, GOAL, % GOAL, PREVIOUS # PRESENTATION VIEWS, AND GROWTH.

DRILL DOWN TO THE DETAILS
by clicking on the name, state, program, etc.