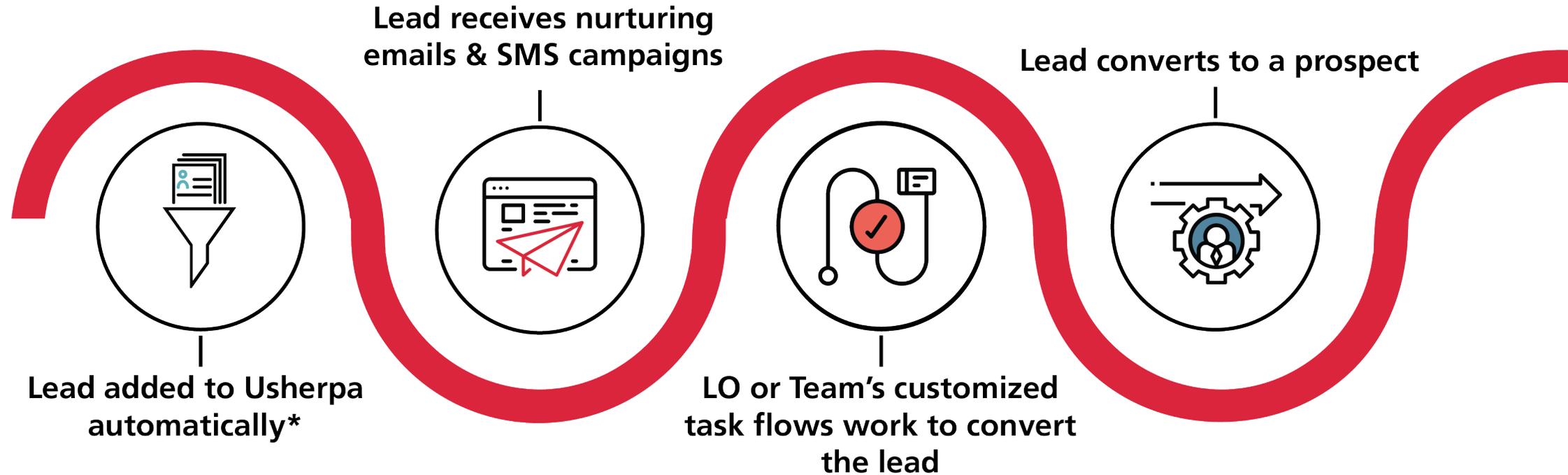


uniquely USHERPA®

*Done-For-You
Marketing*

LEADS



Leads are cold contacts who you have never spoken to or met. For example, a lead from social media advertising.

AUTOMATED LEAD TOUCHES

RELATIONSHIP BUILDER: 47 touches per year

10-week email campaign “Home Steps” helps you start to build relationships with cold leads

PLUS 22 Holiday/Seasonal emails, Birthday email, and 12 local market snapshot videos

[Click here to view the campaign](#)

Triggered as soon as lead is added in LOS

NURTURING: 47 touches per year

12 newsletter emails, 22 Holiday/Seasonal emails, Birthday email, and 12 local market snapshot videos

[Click here to view current newsletter issue](#)

Triggered after 10-week Relationship Builder if no loan is started

FIRST TIME HOMEBUYER: 40 touches per year

5 bi-weekly emails with targeted content

PLUS 22 Holiday/Seasonal emails, Birthday email, and 12 local market snapshot videos

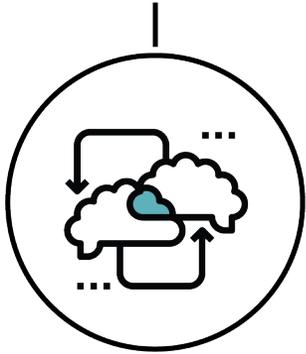
[Click here to view the campaign](#)

Can be triggered by tag in LOS

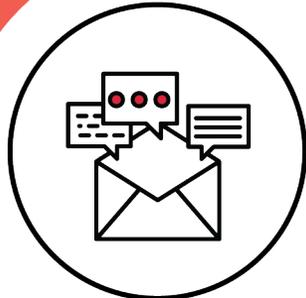
Triggers established on a company level, and defaults can be customized.

PROSPECTING

LOS Integrated data updates
Lead info in Usherpa*



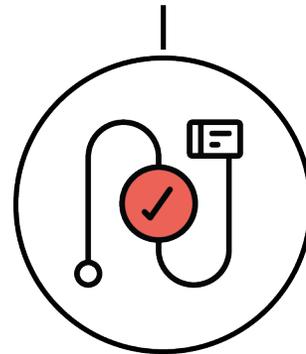
LO or Team's customized
task flows work to convert
the prospect



Prospect receives targeted
marketing via email & SMS

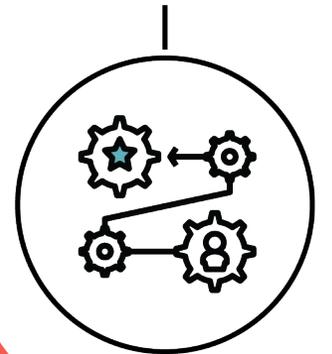
CAMPAIGNS INCLUDE:

- Actively looking
- Credit challenged
- Refinance
- First Time Home Buyer
- New Build *(optional by company)*



Real Estate Agent receives
alerts on app status
automatically

Prospect begins
the loan process



***Prospects are contacts who you have pre-qualified,
talked to, or know.***

AUTOMATED PROSPECT TOUCHES

ACTIVELY LOOKING: 47 touches per year

12-week email campaign sent during the critical home-shopping period

PLUS 22 Holiday/Seasonal emails, Birthday email, and 12 local market snapshot videos

[Click here to view campaign](#)

Triggered when prospect is added into Usherpa

NURTURING: 47 touches per year

12 newsletter emails, 22 Holiday/Seasonal emails, Birthday email, and 12 local market snapshot videos

[Click here to view current newsletter issue](#)

Triggered after 12-week Actively Looking campaign, when no loan is funded

FIRST TIME HOMEBUYER: 40 touches per year

5 bi-weekly emails with targeted content

PLUS 22 Holiday/Seasonal emails, Birthday email, and 12 local market snapshot videos

[Click here to view campaign](#)

Can be triggered from field from LOS

CREDIT CHALLENGED: 47 touches per year

12 monthly Credit Repair emails

PLUS 22 Holiday/Seasonal emails, Birthday email, and 12 local market snapshot videos

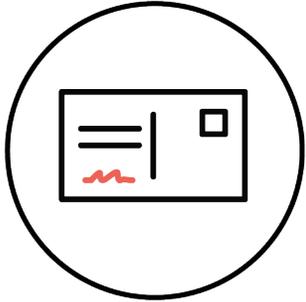
[Click here to view campaign](#)

Can be triggered from FICO Score or custom field from LOS

Triggers established on a company level, and defaults can be customized.

CUSTOMERS

Thank You postcard
with LO signature
sent



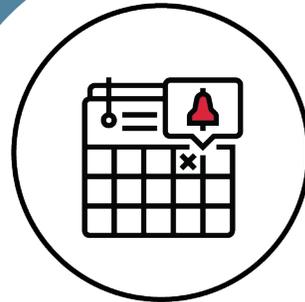
Custom closing
gift sent



Customer receives ongoing
local & targeted marketing
campaigns



LO & Agent receive yearly
customer birthday
reminders



Customer receives annual
loan review reminder



Customers are contacts who have closed a loan with you.

54 AUTOMATED CUSTOMER TOUCHES PER YEAR

All campaigns triggered after loan is marked funded in Encompass

CUSTOMER ESSENTIALS - EMAILS ONLY PACKAGE

THANK YOU CARD: Mailed as soon as loan is funded

[Click here to view current card](#)

HOME & WEALTH: Monthly informative newsletter positioning you as a trusted advisor

[Click here to view current newsletter campaign](#)

HOLIDAY EMAILS: 20 beautiful emails sent on national and seasonal holidays

[Click here to see a sample](#)

HAPPY BIRTHDAY EMAIL: Personal email letting your client know you are thinking of them

MORTGAGE CHECK-UP: Sent on home loan anniversaries

[Click here to see a sample](#)

LOCAL MARKET SNAPSHOT VIDEO: Monthly video featuring housing statistics specific to your region

71 markets and counting

[Click here to view current issue](#)

LOCAL EYES EMAIL: Interactive e-mag about fun activities, entertainment, and local events

20 markets and counting

[Click here to view current issue](#)

Loan Officers can choose to add direct mail and closing gifts in their Usherpa Account.

86 AUTOMATED PARTNER TOUCHES PER YEAR

All campaigns triggered once Business Partner is added into Usherpa under Realtor Essentials

REALTOR ESSENTIALS PACKAGE

INSIDE LENDING: Weekly email featuring key information about the economy and housing market trends

[Click here to view current issue](#)

ESSENTIAL HACKS: Quick tips about business, technology, and the market

[Click here to view current issue](#)

INTERACTIVE RATE & HOUSING CHARTS: Quarterly campaign showcase rates and housing trends

LOCAL MARKET SNAPSHOT VIDEO: Monthly video featuring housing statistics specific to your region

71 markets and counting

[Click here to view current issue](#)

LOCAL EYES EMAIL: Interactive e-mag about fun activities, entertainment, and local events

20 markets and counting

[Click here to view current issue](#)

MUTUAL CLIENT REMINDERS: Reminders of mutual client's birthdays and closing anniversaries

Loan Officers can choose to add Business Partner Prospecting packages at the contact level.

Business Partners are Referral Partners (like financial planners, CPAs, etc) and Realtors who you have done business with, or who you have met and want to build a stronger relationship with.

EMAIL MARKETING CALENDAR

MON	TUE	WED	THUR	FRI
INSIDE LENDING				ACTIVELY LOOKING
INSIDE LENDING	RELATIONSHIP BUILDER	HOME & WEALTH QUARTERLY IR CHARTS		ACTIVELY LOOKING CREDIT CHALLENGE
INSIDE LENDING		ESSENTIAL HACKS	POWER TOOLS	ACTIVELY LOOKING
INSIDE LENDING	FIRST TIME HOME BUYER		LOCAL HOUSING VIDEO	
INSIDE LENDING				

BUSINESS PARTNERS

PROSPECTS

CUSTOMERS, PROSPECTS & LEADS

PROSPECTS & LEADS

LEADS

ALL CONTACTS



HOLIDAY EMAILS

- | | | | |
|------------|-------------------|-------------|--------------------|
| ▶ January | New Year's Email | ▶ June | Summer |
| ▶ January | MLK | ▶ July | Independence Day |
| ▶ February | Groundhog Day | ▶ September | Labor Day |
| ▶ February | Valentine's Day | ▶ September | Fall |
| ▶ February | President's Day | ▶ October | Halloween |
| ▶ March | St. Patrick's Day | ▶ November | Veterans Day |
| ▶ March | Spring | ▶ November | Thanksgiving Day |
| ▶ May | Mother's Day | ▶ December | Season's Greetings |
| ▶ May | Memorial Day | ▶ December | Winter |
| ▶ June | Father's Day | | |

▶ VIDEO EMAILS

OTHER EMAILS

- TIME-CHANGE**
 November
 March
- BIRTHDAY**
- CLOSING ANNIVERSARY**

DISCLAIMER: Emails subject to change on month to month basis based on holidays