



# SUREFIRE<sup>SM</sup>

## CRM & MORTGAGE MARKETING ENGINE

Surefire helps thousands of mortgage lenders and mortgage loan officers win new business, earn repeat business and gain referral business.

### Marketing

- Email
- Power Messaging
- Power Video
- Landing Pages
- Lead Forms
- Facebook Integration
- Surveys
- Partner Co-Branding
- Self-Pay Print Postal

### Creative

- Flyers
- Marketing Automation
- Interactive Tools and Games
- Videos

### Management

- Content Approval Manager
- Configurable Roles and Permissions
- Reporting and Dashboards

### Administration

- LOS Integration
- Enhanced Workflows
- MS Exchange Sync
- Zapier Integration
- Zendesk Support
- Data Uploader
- SSO
- Custom Rules
- Tags and Labels
- Custom Fields

### Sales

- Single Property Sites
- Online Loan Calculators
- Lead Scoring/Lead Management
- Click to Call
- Calendars and Tasks
- Power Calls
- Mobile Experience
- Rate Alerts



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## CLOSE MORE LOANS & EARN REPEAT BUSINESS

### Marketing Automation

- Automated rules-based workflows from data entry in LOS or from lead portals
- Automated loan status updates with Surefire dynamic personalized videos
- Tasks built into the workflows to remind the loan officer to follow up

### Award-Winning Content

- Library full of launch-ready emails, texts, flyers and social media content
- Weekly referral partner and timely content to address industry hot topics
- Tools to create your own custom content

### Loan Officer Favorites

- **Single Property Sites** – Realtor listing spotlights and postings + QR-coded open house flyers
- **Opportunity Alerts** – Rate, past customer property listings, credit pulls
- **Dedupe Utility**
- **Pulse Reports** – Set it once, automated and delivered dynamic reporting
- **MyViews**
- **Power Calls**

### Integrations

- **Loan Origination System:** (Calyx, Empower, Encompass, LendingQB, OpenClose, etc.)
- **Microsoft Exchange** – Outlook email
- **Social Media** – Facebook, LinkedIn, etc.
- **Product, Pricing and Eligibility** – Optimal Blue, Loansifter
- **Point-of-Sale Systems** – SimpleNexus, Floify, Blend
- **Zapier** – Lead gen connection
- **BombBomb** – Loan officer videos
- **Mortgage Coach** – Calculating total cost analysis for clients
- **Monitorbase** – Credit-pull alerts
- **Sales Boomerang** – Credit-pull alerts and more
- **Cardtapp**

... and more through our open API



SurefireCRM.com

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