

*Business Building Solutions
for Mortgage Professionals*



Find out more about the Single Access Solution that helps Loan Originators become **more** efficient and communicate **more** effectively.

Unify: Multiple Processes. Single Solution.

Unify improves the overall quality, efficiency and experience of your customer engagement process. It gives you the visibility and capacity to help improve customer acquisition, engagement and retention.

UNIFY GIVES YOU OPTIONS:

UNIFY

Designed for all stakeholders – companies, managers, loan officers, processors, borrowers and professional partners - Unify is a single solution delivering multiple tools to help simplify processes, improve efficiencies and improve workflow.

UNIFY PRO

Tailored for loan officers, Unify Pro delivers the power of Unify – improved efficiencies, thorough compliance management, simplified document management and increased customer visibility – plus a suite of next-level tools to help you build your business.

UNIFY ENTERPRISE

Unify's business-wide platform adds the ability to easily track and improve performance while leveraging the Single Access Solution that improves the overall quality, efficiency and experience of the mortgage process.

PRODUCTIVITY MULTIPLIER – Get More Done

Your team is busy. With new rules, shifting regulations, and all their requirements, you need a powerful solution to help you be more efficient. This is why we created Unify.

Single Access Solution – Save time and keep your momentum. Unify is a comprehensive, complete solution – no jumping from software to software, no searching for buried files, passwords or programs. One login, one database, one solution – *it's all right there.*

Web-Based SaaS (Software as a Service) - The web-based hosting advantage delivers reliable uptime, high levels of security, frees up IT staff, and allows secure access anywhere there's an internet connection. Plus there's no maintenance or software to install.

Pipeline Management Tool – Don't miss a beat. Access Unify from anywhere you access the web and get real-time reporting – summarized or detailed – on loan status and milestones, plus instant access to Underwriting Conditions.

Task Manager – Work moves fast – stay on top of it. Set up alerts and assignments based on changes in status to help you manage scheduled tasks, follow-up calls and reminders. Works seamlessly with Unify's integrated phone system.

Business Analytics – Knowledge is power. Simple, clear reporting that provides real-time performance visibility across all levels of your business operations.

MBS Live Streaming Market Data – Provided by Thomson Reuters, this gives loan officers important, real-time financial market information.



Attract & Retain Top Talent - Unify's performance helps you keep your top talent on board and makes recruiting easier. Performers want the solutions that help them perform. Unify delivers.

BUSINESS GENERATOR & CONTACT MANAGEMENT SYSTEM – Build Better Opportunities

Growing your business means staying connected to people most important to you - your customers. Unify provides you and your team with a variety of valuable resources to do just that – stay connected.

Leads Management – Unify's Leads Management system pulls data from lead providers and web pages, and organizes it to automatically give you the information to nurture more effectively. Quickly and easily build and manage multiple lead programs from multiple sources in a single platform. Measure results, set follow up tasks, or initiate communications with just a few quick clicks.

Email Verify – Keep your list pristine. This service automatically identifies invalid and out-of-date email addresses and combines with a data de-duplication system to help you refine and focus your email communications.

Opportunity Alerts – Seize the opportunity right when it happens. Notifications trigger you to respond to events that could result in new transactions. Set alerts for birthdays, customer cost savings, ARM resets, P&I requirement expiration, rate savings – just about anything that gives an LO a reason to contact a client.

UNIFY INTEGRATES SEAMLESSLY WITH YOUR LOS:

- Be more efficient in your customer outreach and communications
- Leverage a Single Access Solution that integrates seamlessly with your LOS
- Effectively manage and meet communications compliance requirements
- Streamline customer, contact and lead management
- Create and deliver brand-specific marketing materials
- Immediately and significantly reduce costs and overhead

THE GOAL? To increase sales and profits.

Designed for all stakeholders – companies, managers, loan officers, processors, borrowers and professional partners – it can be tailored specifically for your business.



UNIFY CAN HELP YOU ACHIEVE:

- Higher levels of trust
- Improved conversion ratios
- Potential for a rapid ROI
- Higher customer retention rates
- Better talent retention

Mortgage Insights – This powerful sales presentation tool gives you the ability to clearly and effectively show your customers the loan options that make sense for them. With integrated tools to prepare and present various loan options in an easy to digest, visually engaging, and compliant way, your loan originators will close more deals with more satisfied customers.

Listing Alerts – Keeps you on top of opportunities with daily alerts that let you know when someone in your database has listed their home for sale.

Move Update – Keep your database up to date and your communications going to the right place. This alerts you when someone in your database files a change of address form with the Post Office.



Direct Mail – Easily create marketing campaigns to one... or to many. Direct mail continues to be an important marketing channel and never has it been so easy to manage. Mail to those you already know or create a list with specific demographic selections. All marketing pieces are created with your brand in mind.

Mortgage Flyers – Professional, high-quality graphics on flyers tailored especially for you. Easy to download, the flyers come with your personal contact information already added – no tacky stickers or messy handwriting.

Marketing Collection – Teams your marketing department with our researchers, graphic designers, and writers to develop fresh materials on a regular basis. Whatever you're communicating, you get content that is fresh and relevant to your customers, graphics that work with your brand, and materials that work across multiple marketing channels.

MARKETING PLATFORM - Tell Your Stories

You need a way to reach a wide range of individuals – each with different goals, interests and urgencies. Unify puts it all in one place – everything you need to get your message out in a powerful, compliant way.

Marketing Concierge – Automatically send communications, either direct mail or email, for specific events – holidays, rate adjustments, birthdays, closed loan – anything you choose. Leverage any combination of emails, greeting cards, direct mail, or other communications you want – all branded with your images, logo and content.

Email Marketing – Get your word out with brand-specific and graphically appealing emails. With no limits on the number of emails Loan Originators can send, there is no reason not to stay in touch. Complete analytics lets them know what's working and who's looking.

Marketing Analytics – Know what's working. This links to marketing programs – direct mail or electronic – to deliver statistical information so you can track and capitalize on successes. Works on any level – LO, Branch, or Company-wide.

Marketing Audit – Compliance made simple. With this feature, staying compliant with requirements to archive ALL of your marketing communications for 2 years is easy. Totally comprehensive – it gives you access to every direct mail piece, email, flyer download, and Mortgage Insights report. Do your search, generate the report, save the file, and give it to the auditor. It's that easy!

"Unify and Unify Pro may contain some of the features noted in this brochure. To find out more, and uncover what will best work for you, contact Cross Media."

Unify Your Business.

Learn how Unify simplifies and reduces the expense of:

- Business Intelligence for Managers and Loan Originators
 - Robust Customer Relationship Tools
 - Lead Management and Distribution
- Company Driven Marketing and Communications
 - Sophisticated Business Building Tools
 - Customer and Producer Retention



Cross Media, LLC is an innovative provider of mortgage-lending marketing tools and technology services. We help mortgage banks, community banks, mortgage brokers and credit unions connect to their customers, communicate efficiently, and more effectively manage their relationships. Our services include software development, custom design of marketing materials and campaigns, target-marketing lists and marketing communications compliance.

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