



Maximize Your Marketing Return on Investment With Surefire CRM's Blueprints for Success



No two lenders are exactly alike.

Brokers, independent mortgage banks, credit unions and community banks all have different needs. Within these broad categories, each company's size, structure and origination channels will have a huge impact on its day-to-day operations.

In fact, even two lenders that employ a similar number of originators and produce similar annual volume can look vastly different "under the hood."

All these differences influence how lenders approach marketing. Some consider the marketing budget to be a corporate line item. Others share marketing costs across divisions, regions, branches or even individual loan originators. Lenders may take a centralized approach to content creation, approval and deployment, or they may prefer to give more

control to individual users. Lenders may have an entire marketing department, a single marketing manager or no internal marketing resources at all.

We put our knowledge to work for you.

Nearly 20 years of working hand-in-hand with mortgage lenders of every kind has given us deep industry experience and an appreciation for lenders' preferred operational models. There is no partner more deeply committed to enabling the success of every mortgage lender — no matter its size or shape — than Top of Mind Networks. If you need a flexible mortgage marketing automation platform that can be precisely tailored to support exacting organizational goals, Surefire CRM is for you. And for those who want to cut straight to the chase, we created **Blueprints for Success**, our selection of out-of-the-box modules any lender can use to configure Surefire CRM for maximum marketing ROI.

Build the marketing engine of your dreams.

- **The right balance between tailored and turnkey**

Surefire CRM offers extensive options for customization. That flexibility is key to ensuring your software scales with your company as you grow and change — but it can also be overwhelming. Think of our Blueprints for Success as out-of-the-box strategies that keep decisions simple, so you're never limited by your own imagination.

- **The fast track to profitability**

Our goal is to ensure your **CRM is customized** not just to your preferences, but to your profitability. By cutting down on costly learning curves, our Blueprints for Success help you improve ROI by deriving more value from Surefire, sooner and without hiring a six-figure developer to achieve your mission.

Surefire creates revenue growth and cost savings by converting more prospects into applicants, more applications into closed loans and more past customers into repeat customers. We know you can't realize these benefits if your software's sitting on the sidelines. Our Blueprints for Success will show you how to quickly turn reluctant team members into enthusiastic adopters of Surefire so you can maximize our system's effectiveness and your ROI.

- **Best practices informed by industry expertise and peer data**

Great mortgage professionals aren't always great marketers — and conversely, other CRMs aren't great at understanding the mortgage business. At Top of Mind, we're proud to be your trusted advisor in mortgage AND in marketing. We've been working alongside lenders for nearly 20 years, plus our system data gives us the ability to measure what really works for mortgage lenders like you. We applied this subject matter expertise to developing our award-winning library of **Surefire Creative content**, and now, with Blueprints for Success, we can offer you guidance on perfecting your processes, too.

- **Clear strategies that yield predictable, measurable results**

Can you imagine letting someone build your home without first agreeing on the house plan? If you want predictable results, you need a plan. Our Blueprints for Success define a clear path to solving problems and achieving business goals.

We are committed to providing a solution that helps you measure the success of your chosen path and share it with your leadership. This means not only providing you with meaningful data from Surefire CRM, but also combining those metrics with data from your LOS and other integrated systems so you can accurately attribute closed loans to specific marketing activities. In addition, we're developing market benchmarks through our partnerships with companies like MobilityRE, so you can understand not only how you compare to other Top of Mind clients, but also to companies who don't use Surefire CRM.

Your Wholesale/TPO business needs a different approach, as well. Your Account Executives need marketing support to connect with their broker partners to keep you top of mind. Rate Sheets need to be distributed alongside differentiators that help your loan products get the borrower attention they deserve.

Whether you are a lender looking to create a completely digital mortgage experience or one that specializes in serving borrowers who do not meet traditional lending guidelines, Surefire CRM gives you the ability to create a custom roadmap with the assistance of some of the industry's leading professionals.

Don't start from square one. Start from square 10 with Surefire CRM's Blueprints for Success.

Book a demo today!

Different Blueprints for Different Business Models

Your Consumer-Direct business uses a centralized and brand-centric marketing message as well as powerful lead acquisition, rating and distribution for higher lead to application and servicing recapture rates.

A Distributed Retail mortgage business thrives on the relationships mortgage Loan Officers nurture over the years while striving to earn referrals from local agent partners.