

Sample Follow-up Emails:

<Name>, Here is some information that may help you in regards to the lead management discussion. Further, I have attached a brochure that outlines some of the important facts about our tool.

icoSales gives you a method to bring leads in from real time sources, allocate and distribute them automatically, and get reporting on every channel and agent in order to ensure that no lead is wasted, every agent is calling, and nothing falls through the cracks.

- Our unique Pull Method ensures that your Loan Officers are taking leads when they are ready for them--you are not "pushing" costly leads out to them when they are not working or when they are not ready. This ensures that every lead gets attention and not just the "cherry picked" leads, saving you valuable ROI. You're not just buying an Excel spreadsheet.
- Configurable in literally minutes and scalable to as large as you need. Implementation is done in a few hours with most major lead providers. You don't have to wait for weeks to be up and running.
- Web based, with the ability to send drip emails from your Loan Officers email addresses.
- Integrated Zillow Zestimate on every lead address.
- **Top 20 Lenders like PHH and Home Loan Center, Top 40 brokers like Eagle Home Mortgage (Lennar Homes), and call centers like ICT are using icoSales to successfully increase conversion by 3-8% through the use of business rules and settings that force action on every lead, thereby increasing the contact rate sometimes to 80 calls a day which then drives conversion.**
- Subscription pricing of \$50 per user per month with the ability to create your own teams, branches, or channels.

As far as lead providers go, here is some information that could help as well--

The contact at Juicy Leads would be Billy Minor (bminor@juicyleads.com). Juicy Leads has some great numbers on the 30 day app rate on our website and they have told me they double scrub their leads and don't sell them more than 3 times.

Next, I would suggest Jeff Bartlett at Consumer Track-- www.consumertrack.com. His number is 310-297-9233 and his email is jbartlett@consumertrack.com. Consumer Track is a smaller company but they have very good quality leads.. In fact, I know he has talked about giving some trial leads to clients who use our lead management system so they can see how both work together.

LoanWeb has been creating some quality leads lately. I would definitely give John Wilds a call over there--800-410-1955. He is the Director of Sales. They are MUCH more affordable than LowerMyBills or LendingTree and their quality has increased. His email is john.wilds@loanweb.com.

Lastly, I would contact John Challis at Leadpoint. Leadpoint is a lead exchange, which would allow you to buy smaller quantities of leads than most companies. Further, you can name your price on their system. John's info is 704-780-1163 john.challis@leadpoint.com.

Call me and we will set something up very quickly.

<Name>, I heard you had a conversation with Amy about predictive dialers yesterday. I am just giving you some facts that I think are important and you can do what you want with them. Hopefully, it helps the discussion process.

- 1) Using a dialer will be an initial cost outlay of thousands of dollars and may require significant setup and implementation.
- 2) If you load the dialer in the morning and the calls you get then don't get picked up, you can't call on them until at least the next time you manually load the dialer which will probably be once a day.
- 3) There is no recording of information, such as bogus or disqualification with a dialer--it simply rolls over the number.
- 4) A dialer creates gaps in the conversation until telemarketer comes on the phone, significantly reducing the quality of the customer experience.
- 5) No ability to "go back"--Once I go through a call on the phone, I am on to the next dialer number--I can't speak to someone who just called me back.

The purpose of a dialer is to artificially build call volume externally. This is what icoSales does in that callback periods are set by the business rules configuration. This way you know that a lead will come back to a LO every 2 hrs, 4 hrs, etc.--whatever the status rule and time period set.

The other feature of a dialer that many people find useful is the ability to give a telemarketing team access so they can then transfer to qualified Loan Officers. This is what icoSales does efficiently through the transfer functionality, to both a channel and an individual.

Bottom line-- While you may end up deciding to go with a dialer, I will let you use icoSales for 30 days free to see if Aaron gets the results he is looking for.

Remember-- I could take your old, stale leads sitting in Leads360 right now and import them into icoSales, send them through your telemarketing team, and they could make upwards of 80 calls a day, transferring hot leads in the system to Loan Officers ready to assist.

I could literally have you set up by Friday morning to do it. We had one Leads360 client that uploaded \$21M in stale lead volume from their system into icoSales and ended up closing \$1.8M of it. (That was during their free trial month)

Later--

Good morning, <Name>. Thanks for taking the time to speak with me yesterday. As I said before, I can appreciate your feelings for Leads360. I wanted to give you some of the important points to consider when looking at your current system compared to ours.

- Your current system more than likely does not give you "real time" leads. Rather, it goes and "checks" for new leads every fifteen minutes, creating significant inefficiencies as well as putting you in second place behind anyone who actually gets the lead in real time. icoSales brings leads in to the system in true real time and ensures that your Loan Officers are getting the leads as soon as they come in.
- Your current system "pushes" leads out to your Loan Officers. Therefore, your Loan Officer's pipelines look and operate much like an Excel spreadsheet and their email inbox. It shows a long list of leads (which doesn't cause an agent to action any of them)

as well as continuing to pile new leads into the pipeline, whether the LO is ready for them or not. As a company, your hope is that at some point during the day, the Loan Officer opens every new lead and calls on it. But what ensures that they call on the leads from yesterday afternoon? What happens is leads get lost in the mix without being followed up, new leads become stale because LO's don't work them timely, and nothing incents the LO's to work EVERY lead. icoSales uses a "pull" methodology so that leads are only taken by Loan Officers when they are ready for the next lead. Every lead must be actioned and worked, thereby ensuring your ROI on the lead purchases.

- While your current system may organize leads into one screen, is it really giving you a return on your investment? Chances are, your conversion has not increased since you have been using it. It just made life simpler. With icoSales, our clients are seeing increases in closed loan conversion of 3-8%. The reason is clear--icoSales drives call volume from the average of 25-30 calls per day to 60-80 calls per day per Loan Officer. This is due to the fact that each lead must be actioned and a disciplined sales process is built in. Since the contact rate is driven up, the application rate is driven up. After that, it just stands to reason that the app rate drives the close rate. See our CEO's conversation with Jeff Solomon of Leads360 here-- <http://bettercloser.com/2006/07/17/push-v-pull-lead-management-methodology/>
- Added costs--Why would your lead management system charge you for adding new lead providers? We think about this from our client's perspective (we ran national sales teams at Quicken Loans and DeepGreen Bank). You should be able to add as many providers as possible--that's the point of our system--make the lead process better! We never charge for adding lead providers.
- If you really looked at your organization, you probably still have a person who is the "Lead Manager", shuffling leads around all day, monitoring to make sure the leads are where they are supposed to be, and essentially managing the process. We believe that's what the tool should do and that's why companies that use icoSales say their Sales Managers can now manage the sales teams from a reporting standpoint as opposed to pushing leads in and out of queues. We believe they should assist Loan Officers in becoming better sales people.
- Does your system bog down? Do your Loan Officers sometimes complain that switching from window to window takes 15-20 seconds at times? Based on the way we have built the icoSales platform, you won't see any slowdowns, so your Loan Officers can keep working.
- icoSales allows Loan Officers to transfer leads between each other without having to go through a Lead Manager to do so. Not only does this function allow your organization to have more autonomy at the Loan Officer level, it also ensures that you can create specialty channels for use with a telemarketing front end.

Pardon the length, but I wanted to give you some ideas of how we are different. I definitely think a Webex demo would allow you to see the tool in action and how it would operate in your company. Further, we feel confident enough in our product to go head to head with your current system. I am willing to offer you a 30 day free trial for any number of users you wish. We can put either new leads into the system with one of your lead providers (I can have you connected in a matter of a day or two) or I can even take your aged leads from your current system and input them to show you how much your current system missed. (One recent client did this exercise and turned \$18Million in additional applications from AGED leads that were in their former lead management tool)

I think it is important that you see the differences in the two systems, even if at the end of the day you stay with your current Lead Management. Call me to schedule a demo!

<Name>--

Buy Internet leads? ***We don't sell them.*** We help **you convert** them. Here's what you do—

- Call us with who your lead providers are.
- Fill out a subscription agreement (\$50 per user per month—cancel at any time)
- We set you up to receive your leads in real time and give your office the freedom to manage auto distribution, reporting, and drip email campaigns on every lead.
- Access your leads from anywhere you have an Internet connection and do it within a day or two of initial setup.

Stop wasting leads—Get icoSales lead management to ensure every lead is contacted!