

••• Marksman Essentials •••

PROSPECT MANAGEMENT

Get in touch with your customers by using Marksman's prospect management tools. Marksman's fully automated CRM (customer relationship management) solution helps you manage your prospects so you can always stay on top of your pipeline.

Key Benefits

- Setup and trigger automatic email campaigns to be sent to prospects
- Include real-time rate data in automatic messages
- Send rates to prospects instantly even if rate thresholds haven't been met through initial RateTracker settings so when rates drop, your prospects still receive the low rate notification
- Migrate all of your tasks and prospect data to Outlook so you always know who to call and when
- Send out the newly government mandated GFE (Good Faith Estimate) to prospects directly from your Marksman account
- Add company fees in the profit and cost section of your account so those fees populate automatically on your company's GFE forms
- Access a detailed library of historic reports on your prospects
- Take advantage of customizing your prospect search page so you can view the information that is relevant to you
- Integrate your prospecting tools directly with your LOS provider

"Not just for pricing... Marksman is also a complete lead management solution."

Available Custom Columns		Chosen Custom Columns
Assigned To		Tracking ID
Comments		Lead Source
Email		Lead Status
Home Phone	▶	State
Loan Amount		Filter ID
Loan Purpose	▶	Date Added / Modified
Lock Exp Date		
Mobile Phone		
Work Phone		

- Get instant access to a prospect quickly through the 'quick search' box
- View and capture 'unworked' leads through Marksman's Bulletin Board
- Export prospect information into a FNMA 3.2 file for easy processing

Contact your account manager to learn more!

