How It Works

1. We Create Your Campaigns

Upload your prospect spreadsheet and select the campaign you want to run. Choose the four qualified and non-qualified loan options you want to offer, along with your rates and rebates.

Once your selections are made, the system automatically generates:

- **Clean, client-ready PDF presentations**
- **Structured call-center scripts** tailored to each borrower
- **Structured agent scripts** with clear, benefit-driven talking points
- **Easy-to-follow visuals** your agents can present with confidence

Your team receives everything they need to deliver clear, compelling conversations that convert.

2. Download the Application

Our developers deploy and configure the application **directly inside your SQL Server environment**. All data—including client, prospect, and campaign records—remains fully contained within your infrastructure and under your administrative control.

- We **do not host, store, transmit, or access** any borrower-identifiable information.
- All campaign activity is managed internally by your team, ensuring full alignment with your organization's **security policies**, **confidentiality protocols**, and **regulatory requirements**.

Remote Support (No Data Access Required)

Our team can assist with non-data-handling tasks such as:

- Downloading your client/prospect spreadsheets into the application
- Setting up templates based on your loan options, terms, rates, and rebates
- Creating campaigns and configuring system settings
- Providing ongoing technical support

All assistance is performed **without accessing or viewing any borrower-specific information**.