



Traction Mortgage

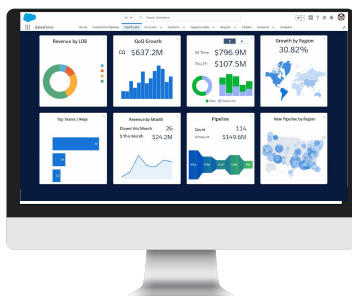
Accelerate Time to Value for Your Mortgage Team

Traction Mortgage offers an accelerated approach to implementation of the Financial Services Cloud Platform for Mortgage firms. This accelerator is comprised of proven best practices that are preconfigured for a 360 degree view of the borrower relationship, center of influence referral tracking, application intake, document management, effective pipeline management and action plans.



BORROWER 360 VIEW

- Opportunity Management
- Document Management
- Applicant Tracking
- Application Intake
- Custom Campaign Builder
- Action plan templates for repeatable processes
- Branch management



DASHBOARDS & REPORTS

Success metrics reporting package

“The Mortgage industry faces its biggest challenge with the impact of the pandemic since the financial crisis of 2008.

Unprecedented volumes, need for streamlined digital borrower engagement and operational efficiency are pivotal to meet the needs of the borrower and future proof the firm.

Traction Mortgage accelerates your implementation of the Financial Services Cloud Platform to bring immediate value.

Pamela Hannett
Principal Strategist, Banking & Lending
Traction on Demand