

Sales Agents

Enable Your Team, Sales and Brand

Enable your team to become Sales Agents for your financial brand. Compliantly create, approve and manage social selling content for your lenders and business development team. Get remarkable results with our sales enablement platform.



NETWORKING

Content Libraries: Create branded and compliant content with preapproved content libraries.

Preapproved Responses: Allow lenders to quickly respond with ready-to-go messages.

Mobile App: Create, modify and approve content through our iPhone and Android Apps.

Personalized Profiles: Personalize the sales process with branded professional social profiles.

MANAGEMENT

Network Oversight: Administrator dashboard allows for oversight of lender pages and activity.

User Controls: Ensure content is compliant with publishing controls and role approval.

Reporting: Dynamic on-demand reporting allows for individual and rolled-up reporting.

EDUCATION

Sales Enablement:

- Learn to network on social through our training options and onboarding resources and
- Leverage insights on content creation and prospect engagement.

Mortgage & Commercial Libraries:

Access content written and designed exclusively for lenders.



Keeping it Compliant

Our Sales Agent Solution allows lenders to collaborate with compliance teams while securely networking on social media with:

- A content approval workflow for new and preapproved responses
- Social media labeling, archiving and reporting
- Resources from our team to help with growth