



MARKETING RESOURCES AT PRMI

We offer a wide range of time-saving resources that can help you connect with customers, build better relationships with referral partners and grow your business.

Find out more about these powerful marketing tools and start expanding your reach today.

Marketing & Sales Tech

MARKETING ONLINE STORE

Ready-to-use, branded marketing content

BIRDEYE

Gather and share customer testimonials

LISTREPORTS

An effective lead-capture tool

MBS HIGHWAY

Stay knowledgeable in a fast-moving industry

MARKETING COMPLIANCE

Protect yourself and your business

MONITORBASE

Monitor borrower behavior, earn repeat business

MORTGAGE COACH

A helpful borrower education resource

READY-TO-GO TEMPLATES

Create your own content with these easy, self-serve resources

SOCIUU

Save time and stand out on social media

WEBSITES

User-friendly websites that help you grow

BOMBBOMB

Video messaging

CARDTAPP

eBusiness cards

SOCIALCOACH

Social media post automation, and video creation

POS

BLEND

End to end application platform

SIMPLENEXUS

Digital loan intake system

ENCOMPASS CONSUMER CONNECT

Free on-line application

LOS

ENCOMPASS

Industry leading loan origination and fulfillment

CRMs

SUREFIRE

A powerful, industry-focused CRM

TOTAL EXPERT

A powerful, industry-focused CRM

Training

BRANCH MANAGER UNIVERSITY

12-hour course for branch managers to be successful

ONE THING SALES FORUM

Bi-weekly sales calls to learn from PRMI's top talent

PRMI-U

On-demand training and development

MORTGAGE ORIGINATOR TRAINING

New Loan Originator training

FAQ

MARKETING ONLINE STORE

Our Collateral & Merchandise Store offers easy access to a wide range of compliance-approved marketing materials, whether you're looking for business cards, flyers, postcards or brochures. Download digital content, order printed materials or buy company branded apparel and accessories.

Additional Resources: [Collateral and Merchandise Store Guide](#), [How to Order Merchandise Video](#), [How to Order B&C Collateral](#)

Pricing: Free account and electronic downloads. Print and merchandise cost varies by item ordered.

Primary Support: [Open an OurPRMI case](#)

Login Page: [ourPRMI.com](#) > Toolbox > B&C



Birdeye's Customer Experience Platform captures customer feedback that can be tracked and reported. This system makes it easy to share positive reviews on social media, Zillow and Google Review pages.

Pricing: \$7 per closed loan

Primary Support: [support@birdeye.com](#)

Secondary Support:
[B&C@primeres.com](#)

Login Page: [ourPRMI.com](#) > Toolbox > B&C

Additional Resources: <https://app.birdeye.com/>



Work with your real estate partners to capture leads. ListReports offers Encompass automation so you can easily advertise your agents' private listings, and nearly any other property connected to the MLS, with tailored "Just Listed" text message alerts.

Pricing: Free version available. Paid version with full functionality is \$100/month per user.

Primary Support: [support@listreports.com](#)

Login Page: [ourPRMI.com](#) > Toolbox > B&C

Additional Resources: <https://welcome.listreports.com>, <https://welcome.listreports.com/prmi>



MBS Highway makes it easier to stay up to date in a fast-moving industry. It sends you a daily video update on the market, text and email notices about changing conditions and real estate data from every county in the U.S.

Pricing: \$93.95/branch per month unlimited* users

Primary Support: [support@mbshighway.com](#)

Login Page: [ourPRMI.com](#) > Toolbox > B&C

Additional Resources: <https://mbshighway.com>

**some restrictions apply*



MBS Highway offers a new tool called *Home Report*. Similar to *HomeIQ* and *Homebot*, *Home Report* helps your clients stay updated on their home value, refinancing options, and other important home-related information. This keeps clients engaged and encourages them to reach out to you with any questions. If you're interested in adding Home Report to your branch's resources, the pricing is outlined below. Please note that this cost is separate from your MBS Highway and List Reports subscriptions if you have them.

Pricing:

\$119.95/month per branch (unlimited users)

\$79.95/month per branch (single user)

Primary Support: [support@mbshighway.ai](#)

With Home Report, Loan Officers (LOs) can subscribe an unlimited number of consumers. If you choose to co-brand, your partner can include up to 1,000 consumers, with an additional charge of \$100/month for every extra 1,000 consumers.

MARKETING COMPLIANCE

Our Compliance team is here to protect you. They provide guidance and review content to be sure it meets necessary guidelines. To insure compliance with federal and state guidelines ex: disclaimers, housing logos, NMLS ID, etc.

Primary Support:

[marketingcompliance@primeres.com](#)

Corporate Contact:

Marketing Compliance ext. 1000047



MonitorBase gives you the power to proactively monitor the credit and consumer behaviors of your local market and previous clients. This powerful system produces huge origination opportunities for the growth of your business.

Pricing: Free Basic monitoring.

Want to know how it works or get support:
monitorbase.com/monitorbase-prmi

Primary Support: Call MonitorBase support 888-795-6575, or email support@monitorbase.com

Secondary Support:
BranchRelations@primeres.com

Login Page: ourPRMI.com > Toolbox > B&C



MortgageCoach
by **trustengine**

Mortgage Coach makes it easy to educate your borrowers with personalized content. For example, you can send your customers an in-depth loan comparison with a video walkthrough. Mortgage Coach also provides interactive graphs and charts with supporting financial details, such as payoff scenarios or net worth projections that can be sent directly to customers through texts or emails.

Pricing: \$85.80/month per user

Primary support: support@mortgagecoach.com

Secondary support:
BusinessTechnology@primeres.com

Additional Resources: <https://mortgagecoach.com>

READY-TO-GO TEMPLATES

These branded templates make creating your own collateral quick and easy. A wide collection of branded templates are available for your use via the link below and can be found on the online store. Click the link below to find PowerPoint presentations, letterhead, Microsoft Teams backgrounds, and more!

[Get Branded Templates](#)

Primary Support: B&C@primeres.com



Sociuu is a simple platform for social media distribution, designed to help you get messaging out, build your personal brand and optimize your recruitment efforts.

Monthly Cost: \$12

Support: B&C@primeres.com

Login Page: ourPRMI.com > Toolbox > B&C

BRANCH WEBSITE SUPPORT

Our ADA-compliant websites strengthen your branding, help you build better connections with customers and even track campaigns from genesis through funding to better inform future marketing efforts. Borrowers can also quickly apply for a loan right from your website. Choosing a corporate-supported website also means you'll get a listing on the main corporate site that drives traffic to you.

Pricing: Free

Support: B&C@primeres.com



Stay connected to your clients and realtors via video messaging to bring a personal touch.



Get your contact information in people's hands electronically.



SocialCoach makes social media marketing easy with built-in compliance, post automation, and video creation.

Point of Sale (POS)



This impressive digital loan application tool lets your borrowers apply for a loan from anywhere, whether they're on a computer, tablet or smartphone. Our online application guides them through the application process and even lets them upload documents for verifications. It also notifies you when someone applies so you can connect with potential borrowers as soon as they get started.

Pricing: \$84 per funded loan

Primary Support: support@blend.com

Secondary Support:

BranchRelations@primeres.com

Corporate Contact: Branch Relations ext. 1000027

Login Page: ourPRMI.com >

Toolbox > Loan Fulfillment



Top shelf digital loan intake system allowing for seamless customer, LO, and referral partner experience.

Primary Support: mortgagehelp@ncino.com



Encompass
Consumer Connect®

A simple and free on-line application. Also available in Spanish. Part of the Encompass suite.

Loan Origination System (LOS)



Encompass®

The industry leading system of record for loan origination and loan fulfillment.

Customer Relationship Management



Surefire is a CRM designed specifically to give mortgage professionals the tools they need to manage customers, gather leads and connect with real estate industry partners. It makes it easy to create and send marketing campaigns, update customers and their agents during the loan process and reach new clients.

Pricing: \$91/month per account

Primary Support: Surefiresupport@ice.com

Secondary Support: BizTech@primeres.com

Login Page: ourPRMI.com > Toolbox > B&C



A powerful, industry-focused CRM

Pricing:

\$127.50 + Tax/month for full access, Gold tier.

\$82.50 + Tax/month for Silver tier access

\$27.00 + Tax/month for an automated seat, Bronze tier.

Primary Support: support@totalexpert.com

Secondary Support:

BizTech@primeres.com

Login Page: ourPRMI.com > Toolbox

Additional Resources:

<https://totalexpert.freshdesk.com/support/solutions>

Training



Branch Manager University

PRMI wants to ensure you know all the tools and access to Corp teams to be successful as a branch manager in our organization. This 12-hour course ensures you know how to win!

Login Page: ourPRMI.com > Toolbox > Training

The ONE THING SALES FORUM

A biweekly interactive training meeting where company and industry leaders share wisdom, tools and tactics for becoming a top producer.

Login Page: ourPRMI.com > Toolbox > Training



Learning management system that gives you access to on-demand training and development for all mortgage roles and systems.

Login Page: ourPRMI.com > Toolbox > Training



Mortgage Originator Training Program

PRMI offers new originator training for people new to the business. We help them pass their licensing exam and be ready as loan advisors in the industry.

Primary Support: cmcdonald@primeres.com

Frequently Asked Questions

HOW DO I GET CREDENTIALS FOR THE SYSTEMS ON THIS LIST?

Our Account Admin team can help you get the credentials you need for Surefire, Experience.com and other systems.

Phone: 1-800-255-2792 Ext.1000030

Email: HelpDesk@primeres.com

HOW DO I FIND SOCIAL MEDIA CONTENT TO POST?

B&C has created a huge pool of social media content for you. To access it, sign up for Social Reach or email B&C@primeres.com. In Social Reach you can share ready-made, professionally designed content that is compliance-approved. You can also create your own posts and schedule posts ahead of time. Social Reach also helps you stay engaged with the people who comment on your pages.

To sign up for Social Reach, visit primeres.com/social.

These videos walk you through using Social Reach so you can create, find and publish content.

Social Reach Tutorial:

<https://vimeo.com/365645949/8159ae4ac0>

Publish Module Tutorial:

<https://vimeo.com/380603698/e393e0883b>

(You can find specific details about the Content Pool in Chapter 6 of this video.)

HOW DO I ORDER BUSINESS CARDS?

From the Collateral & Merchandise Store home page, go to *Self Promotion* then *Business Cards*.

Select the card style you'd like to order and click Order Now. Then select your card type and quantity and add to cart. Once they are in our cart you can check out or continue shopping. You can find a detailed walk through in this guide: [Collateral and Merchandise Store Guide](#)

I WANT TO CHARGE MY BRANCH FOR THE BUSINESS CARDS, BUT THE COLLATERAL & MERCHANDISE STORE WON'T LET ME. WHAT DO I DO?

There is no way to charge Branches from the store. You will need to use a credit card to place your order. Please reach out to your Branch Manager if you need further assistance.

I JUST NEED A PRMI LOGO, WHERE CAN I FIND IT?

You can find the PRMI logo and other resources in our Style Guide ourPRMI.com > Toolbox > B&C

HOW DO I FIND READY-TO-GO MATERIALS IN THE COLLATERAL & MERCHANDISE STORE?

From the home page, click on Content Library. Then choose a category based on the type of content you need. You can also use the search bar to find content. For example, if you want to find something that markets FHA loans, type "FHA" into the search bar.

More resources: [Collateral and Merchandise Store Guide](#), [How to Order Merchandise Video](#), [How to Order B&C Collateral](#)

HOW DO I FIND AND SEND CONTENT IN SUREFIRE?

To find content in Surefire, log in and go to the *Media Library*. From there you can scroll through available content or use the search bar in the top right corner to search for something specific.

To send content you can click on the specific content piece you want to send and then hit the Create Deployment button. You can also go to the *Deployment Center* and send content from there.

Email: biztech@primeres.com

HOW DO I GET HELP WITH MY CORPORATE-SUPPORTED WEBSITE?

If you need help making a change to your website or if you need to get a website set up, please email B&C@primeres.com

CAN I GET MARKETING HELP FROM A THIRD-PARTY?

Yes! You are free to hire your own Marketing agency or consultant. We have vendors who are already approved and can connect you with them as needed. If you'd like to work with someone specific, you can go through the vendor approval process.

Contact the B&C department if you need a vendor recommendation.

Phone: 1-800-255-2792 Ext.1000045

Email: B&C@primeres.com