



ACTIVEPIPE®

Technology Presentation & Demonstration
Prepared for My Local Broker April 2020

For mortgage brokers, poor customer retention has become
the silent killer.

What issues are mortgage brokers facing?

1. Dysfunctional Technology



Aggregator supplied technology is limited and out-dated.

Old marketing technology is clunky and requires too much external help to setup properly.

2. Time Poor



Brokers are too busy running their business to find time to:

- Learn the latest technologies,
- Write content,
- Segment their database.

3. Irrelevant Content



Most people in a broker's database get emails that are:

- untimely,
- generic,
- not engaging,
- full of sales jargon,
- RBA rate updates that nobody reads.

What brokers want:

1. Simple and easy-to-use technology
2. Access effective content they can amend and personalise
3. Easily create emails with videos, blogs and other features
4. Deploy content across teams and staff with ease
5. Everything to look and feel like they wrote it
6. Personalisation for lead types and customer types
7. Understand who in their database they should contact.
8. Integration with their CRM

Brokers want to convert more leads and retain customers long after settlement

What customers want:

1. Don't want to get spammed
2. Don't want to be 'sold to'
3. Don't want irrelevant information
4. How can the broker can improve their situation
5. How can they save money
6. How is their loan tracking?
7. Tell me what's interesting in the market

Customers generally don't want to hear from their broker unless it's something useful

Leads need information that will convince them to use a broker in the future.

**ActivePipe helps mortgage brokers retain customers
and grow their businesses.**

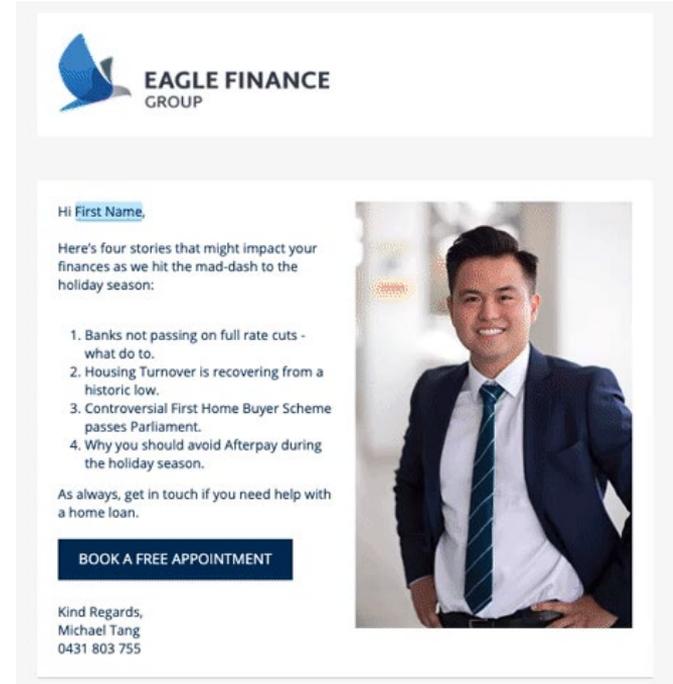
How does ActivePipe work?

ActivePipe is an email marketing technology. The software has campaigns and the functionality to communicate with all types of leads and customers

- Fully-managed Monthly newsletters
- 10+ nurture campaigns to turn leads into customers
- 150+ email library
- Automated post-settlement check-in's
- Fixed Interest Rate & Interest Only Expiry campaigns
- Birthday campaigns

Brokers can also

- Easily create and send their own emails
- Build drip feed campaigns
- Target segments of their database
- Deploy content across video and blogs
- Access analytics to better understand customer intent



The screenshot shows an email campaign header for Eagle Finance Group. The header includes the Eagle Finance Group logo and name. Below the header, the email content begins with a personalized greeting: "Hi First Name". The main body of the email contains a list of four stories that might impact the recipient's finances during the holiday season. The stories are: 1. Banks not passing on full rate cuts - what do to. 2. Housing Turnover is recovering from a historic low. 3. Controversial First Home Buyer Scheme passes Parliament. 4. Why you should avoid Afterpay during the holiday season. Below the list, there is a call to action: "As always, get in touch if you need help with a home loan." followed by a dark blue button with white text that says "BOOK A FREE APPOINTMENT". At the bottom left, there is a signature: "Kind Regards, Michael Tang 0431 803 755". On the right side of the email content, there is a photograph of a smiling man in a dark suit, white shirt, and blue striped tie.

EAGLE FINANCE GROUP

Hi First Name,

Here's four stories that might impact your finances as we hit the mad-dash to the holiday season:

1. Banks not passing on full rate cuts - what do to.
2. Housing Turnover is recovering from a historic low.
3. Controversial First Home Buyer Scheme passes Parliament.
4. Why you should avoid Afterpay during the holiday season.

As always, get in touch if you need help with a home loan.

BOOK A FREE APPOINTMENT

Kind Regards,
Michael Tang
0431 803 755

1.

Leads & Prospects

2.

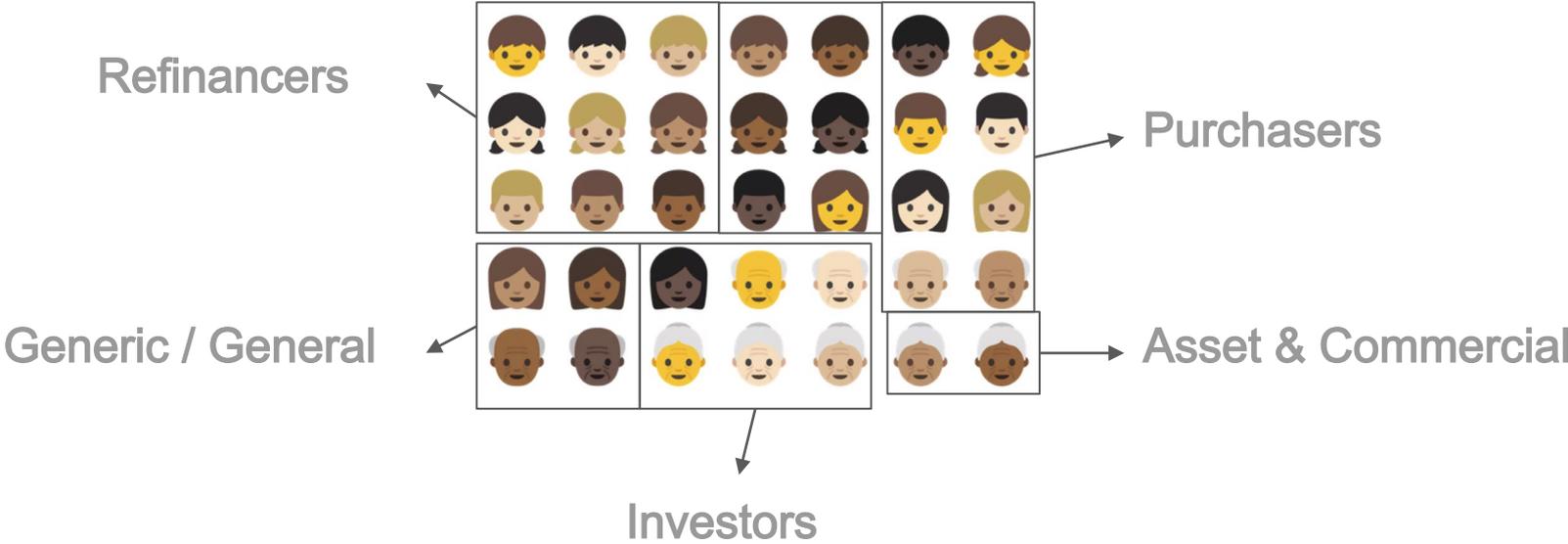
Applications

3.

Settled Customers

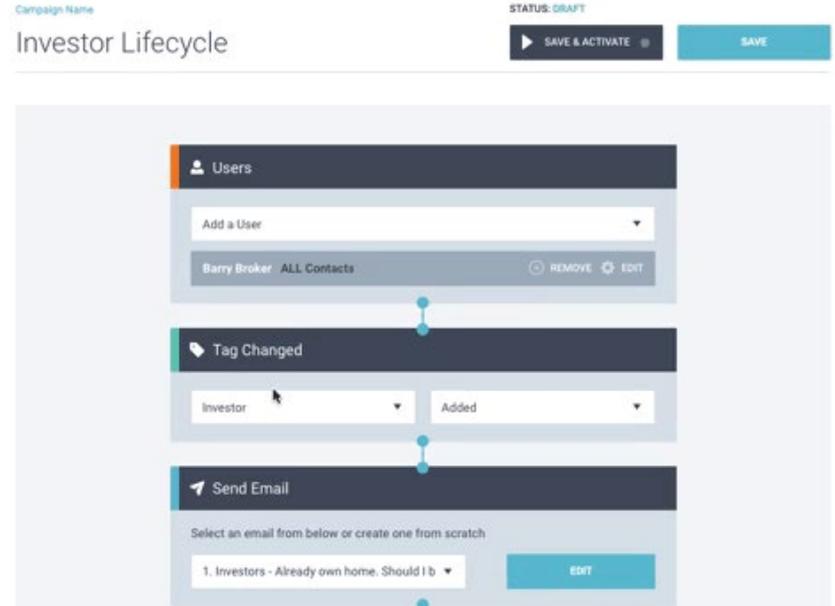


Nurture your leads



How it works

1. Customer is not ready to proceed.
2. Broker activates campaign via CRM or ActivePipe
3. Customer receives targeted content for 12+ months





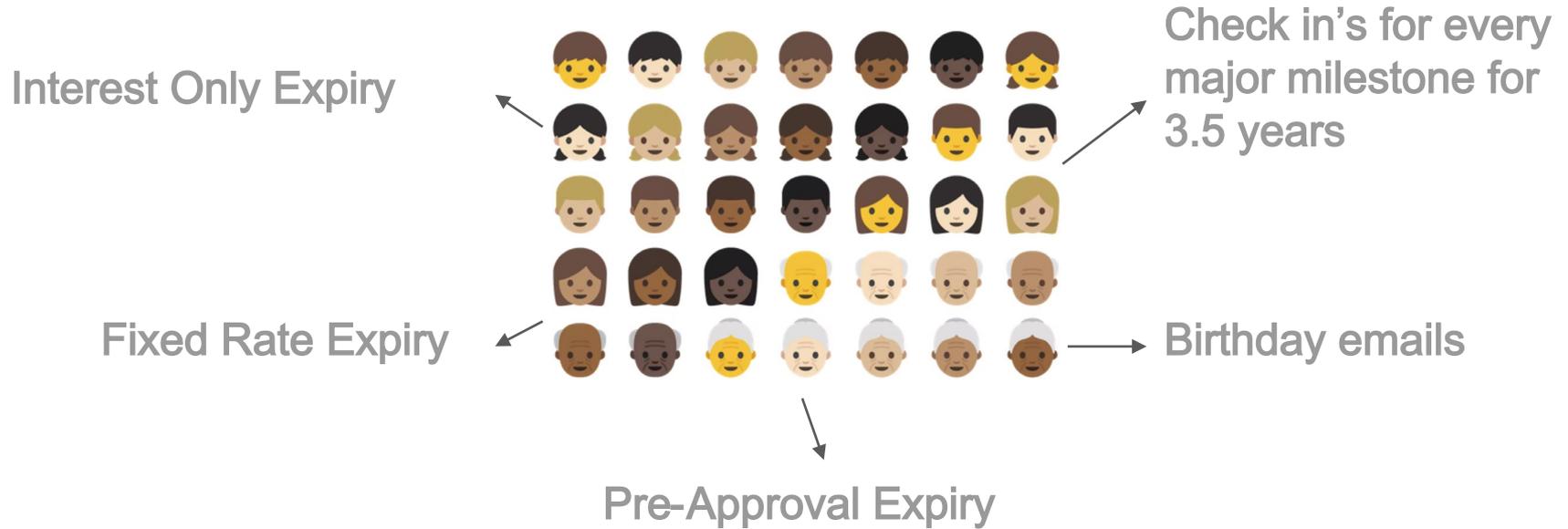
Example of analytics

This is a 30-day chart of sent refinancing nurture emails for one of our members. Everyday she is sending several targeted emails to her database **without having to do anything**.

Opens in the Last 30 Days

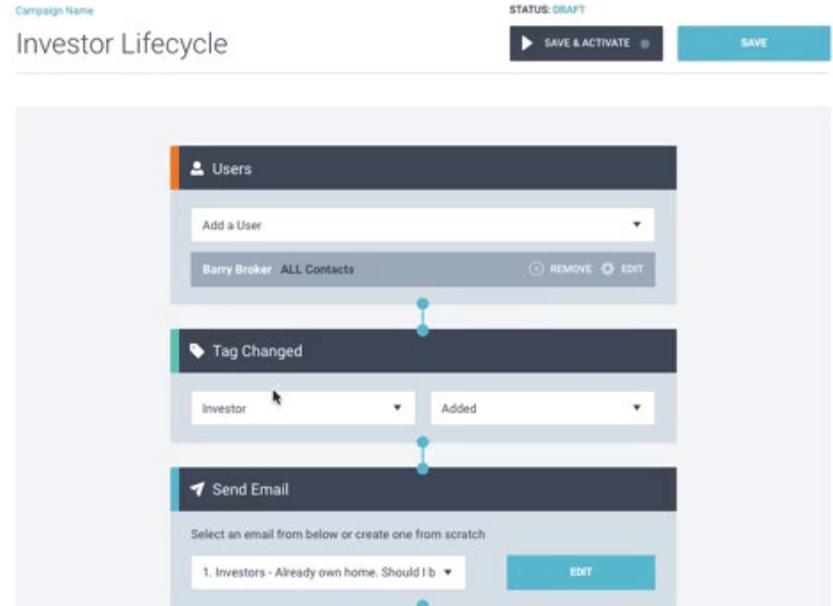


Stay in touch after settlement



How it works

1. Customer Loan Settles
2. Campaign is activated (manually or automated)
 - Date based loan emails trigger within 90 days of event
 - 7 key milestone check in's during 3.5 after settlement



The best monthly newsletters



Hi [First Name](#),

Here's four stories that might impact your finances as we hit the mad-dash to the holiday season:

1. Banks not passing on full rate cuts - what do.
2. Housing Turnover is recovering from a historic low.
3. Controversial First Home Buyer Scheme passes Parliament.
4. Why you should avoid Afterpay during the holiday season.

As always, get in touch if you need help with a home loan.

[BOOK A FREE APPOINTMENT](#)

Kind Regards,
Michael Tang
0431 803 755



Hi Everyone,

Let's catch up on four hot stories making waves this spring;

1. A surprising 3 year property price growth forecast.
2. The rules are changing for fixed rates.
3. Thinking of building? Average times revealed.
4. Soon, you won't be able to spend more than \$10,000 in cash.

Now is a great time to book in a chat about your home loan. There's loads of competitive deals in the lead up to Christmas. Hit the button or give me a call!

[Hit the magic button](#)

Kind Regards,
Sally Prowse
0400 570 051



Help brokers understand the right people to contact



Contacts

Our promise to brokers.

You will stop feeling guilty about not staying in touch with the people you know you should be.



Improve lead conversion rates and ROI



Retain more customers with less work.



Spend more time doing what you're good at.



Prospect for leads off data and intent.

Brokers LOVE ActivePipe

“

The ActivePipe newsletter is the perfect solution for my business. I'm too busy to create the content I need to send to my database and frankly, I wouldn't know what to send anyways. ActivePipe takes the hard work out of email marketing for me and I routinely get leads from my newsletters.

Lee Banh
Loan Market



“

I've found the ActivePipe Monthly Newsletter to be a great way of maintaining contact with clients. The articles are easy to read, informative and professional. Every month after the email goes out, I receive contact back from a number of clients which is great, and of course provides opportunity for potential loan reviews etc. Staying front of mind with my clients has also led to further referrals from them. Thank-you ActivePipe! A great service, and one which I thoroughly recommend

Ian Cook
Mortgage Broker



“

In a sales related environment it is a breath of fresh air to deal with people who are not forceful or demanding because they know they have a product that is way superior to others and the evidence is in the results - thanks ActivePipe!

Gerard Heffernan
Heffernan Lending Solutions



“

Immediately after getting started with ActivePipe and sending out their newsletters I was getting calls and emails back from people I hadn't heard from in years. The newsletter was the perfect Segway into conversations with the people in my database I needed to be contacting. ActivePipe is well worth its value!

Chris Brown
Managing Director - New Vision Financial Services



“

I have been using active pipe for some time now. It is a fantastic way to stay in touch with my customers and provide them with regular updates and interesting information about our industry. I love the way Active Pipe works because while they provide all the content in every monthly email, I have the flexibility to add, change or remove anything before the newsletter is actually issued. It is such a simple process. All of my existing customers were uploaded to the system for me initially, and now I can now add new customers real time as they come on board. The content is always factual, informative, timely and relevant and everyone at Active Pipe have been fantastic to deal with. I would recommend Active Pipe to anyone who wants to provide a fantastic newsletter to their customers.

Catherine Neil
CNN Mortgage Solutions Pty Ltd



“

I am very happy with the quality of the material presented in the monthly newsletter. The recent May letter sent out really engaged my audience where I received some great feedback from my prospects. The material was very informative and relative to the public's interest in all the talk around lending and the elections in the media. This is a great tool I will continue to use in engaging my audience and driving my pipeline of opportunities.

Mehdi Zoghbi (B Comm) - Finance Broker
Director - RC Capital Finance



“

The ActivePipe newsletter enables me to be involved and communicate professionally and effectively with my clients. The feedback from clients has been positive and measurable.

Nick Kokkinidis
Mortgage Broker, Alto Finance



“

The ActivePipe newsletter is far better than the newsletter my aggregator sent out for me in the past.

Neil Gowdie
GOWDIE FINANCIAL



“

In the past I had never had a response from the newsletter my aggregator sent, since sending my ActivePipe newsletter on Thursday I have had four customers reach out to book appointments with me. This is an excellent tool for my business.

Rob Walmsley J.P. Dip FS
Rob Walmsley Financial Services



“

I signed up to ActivePipe and after sending my first newsletter I have picked up two deals out of clients who 'had been thinking about me, but hadn't rung yet.' ActivePipe works great to help you find the opportunities you don't know you have in your database.

Paul Dubois
Profunding



“

I'm convinced that ActivePipe newsletters are the best in the industry - every month it goes out on time and I hear from people who I haven't spoken to in ages but I should have been staying in touch with better, the software is user friendly and its reporting portal is great.

Daniel Donnelly
Sherwood Finance

Our 2 Products

ESSENTIALS PACKAGE

\$89 per month ex. GST

Additional broker profiles \$40 each

Covers the primary needs of a broker - an effective newsletter and the tools to easily create emails.

- Monthly Newsletter
- 50+ Nurture Emails library
- Create your own emails

PLATINUM PACKAGE

\$120 per month ex. GST

Additional broker profiles \$40 each

Nurture & Convert more with state-of-the-art email campaigns to every lead, contact and customer.

- Everything in the essentials package
- 150+ Nurture Emails Library
- Lead Nurture Campaigns
- Automate Post-settlement journeys