

Increase Your Business by  
Building Your Database

Presented by:

In Touch Today

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Your database is a great asset to your business.  
Keep it current, use it and make it work for  
you to reap the rewards.

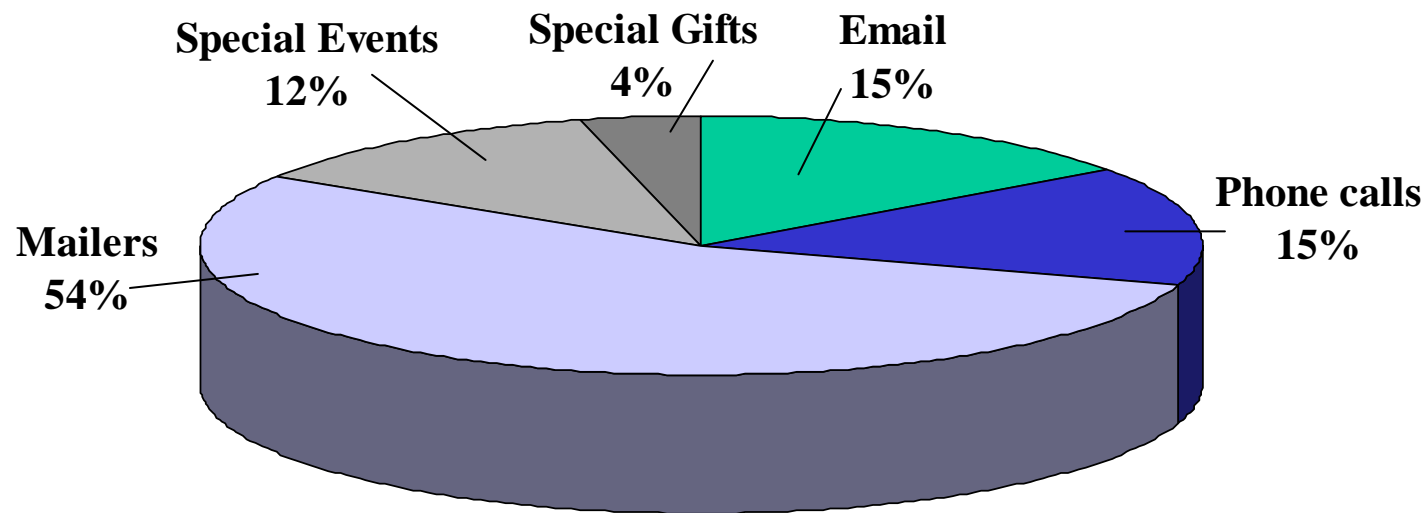
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# What We Will Discuss

- Constructing a personal sphere list.
- Sub-dividing your database list.
- Choosing database software.
- Using database functions.

# Using Your Database to Increase Your Business



■ Email ■ Phone calls ■ Mailers ■ Special Events ■ Special Gifts



# The Benefits of a Database

- Provides a system to:
  - maintain your contact data,
  - track how often and in what way you contact your clients
  - and track your results.
- Provides reminders for on-going tasks and special events.
- Permits sorting by category.



# The Benefits of a Database

- Keeps all client data in one place.
- Tracks the quality of referrals to monitor referral partnerships.
- Keeps your marketing plan on track using automatic event reminders/triggers.
- Keeps track of your prospects.



# What is a Personal Sphere?

- Your personal sphere or sphere of influence is a list of people that you know either personally or professionally.



  
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# How to Build Your Personal Sphere List



- Get a pencil and paper.
- Write the names of people you know personally or professionally.
- Addresses aren't necessary yet.

# How to Build Your Personal Sphere List

- Include the following people:

- Family members and relatives
- Neighbors
- Friends
- Past clients
- Former co-workers, employees
- Mechanic
- Family doctors
- Veterinarian
- Mail carrier
- Dentist
- Dry-cleaner
- Hairdresser/barber

# How to Build Your Personal Sphere List

- Accountant
- Church or club members
- Civic groups
- Yoga or exercise class members
- Chamber meeting members
- Your child's sports team mates' parents
- Teachers and parents
- High school/college classmates
- Stock broker



# Sub-dividing Your List

- Not all clients or personal sphere contacts are created equally.
- Review your list and put a letter by each name:
  - A - send something to these clients on a regular basis
  - B - send something to these clients periodically
  - C - send something to these clients occasionally



# Sub-dividing Your List

- Doing this will make it easy to set your strategies for:
  - designing an effective marketing plan
  - promoting yourself to your target market
  - choosing appropriate marketing materials

# The Rest of the Information

- Once you have subdivided your list, gather the following information:
  - Address
  - Telephone numbers
  - Email address
  - Family member names
  - Birth dates
  - Anniversary date
  - Loan closing date
  - Hobbies, interests
  - Referral names
  - Recording/tracking of client contacts
  - Other information you deem valuable

# Database Software Basics

- To help you decide which database software is right for you, we're going to discuss:
  - What features to look for
  - Generic database products
  - Industry-specific products
  - Software add-ons

# Database Software Basics

- What to look for in DB software:
  - Mail merge capability
  - Fax and email campaign capability
  - Status tracking during:
    - loan process
    - marketing campaigns
  - Prospecting
  - Reporting



# Database Software Products

- The following are very popular, generic database software products:
  - ACT!
  - Goldmine
  - Access
  - Outlook (Contacts)
  - Excel

# Mortgage Industry Specific Products

## – Cimmaron Mortgage Manager

- Store loan and contact data
- Link with Calyx Point and Encompass
  - View loan status information directly from Cimmaron
- Track vendor and client referrals

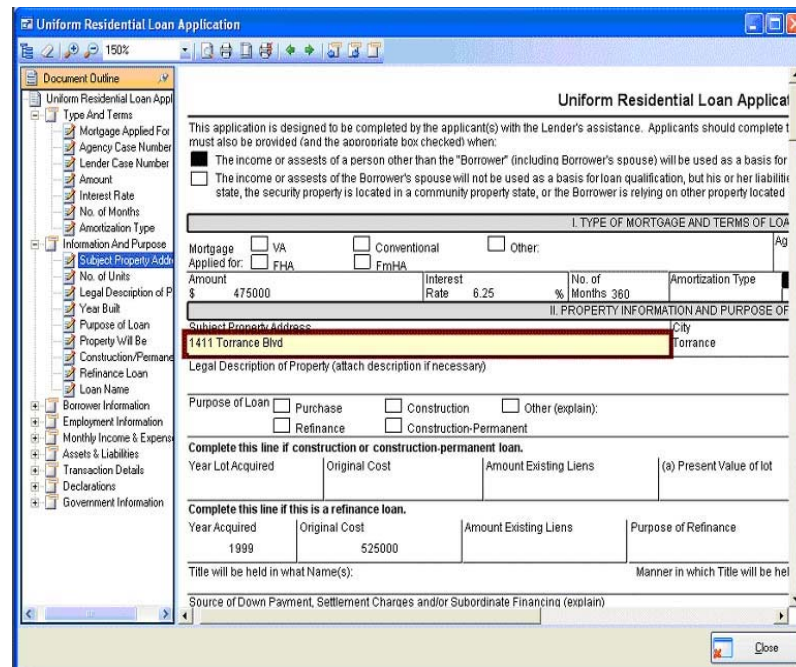
| Client ID | First Name | Last Name | Status   | Address 1         | Address 2 | City       | State      |
|-----------|------------|-----------|----------|-------------------|-----------|------------|------------|
| 10418     | Darren     | Haven     | Borrower | 7092 Crest Road   |           | La Mesa    | California |
| 10395     | Tim        | Jacobs    | Borrower | 9893 Lakewood     |           | Oceanside  | California |
| 10460     | Bob        | Jones     | Borrower | 4899 First Street | Unit 407  | San Diego  | California |
| 10420     | Aaron      | Kasfinan  | Borrower | 5232 Highland St  |           | Kingsman   | California |
| 10425     | Jerry      | Kilron    | Borrower | 5032 Penn St      |           | Torance    | California |
| 10292     | Jim        | Laven     | Borrower | 6312 Kaywood d.   |           | Calisbad   | California |
| 10440     | Steve      | Liston    | Borrower | 1452 Torrance Bl. |           | Torrance   | California |
| 10458     | Joseph     | McKinley  | Borrower | 8996 Via de Reina | Apt. 485  | San Diego  | California |
| 10328     | Gina       | Meyers    | Borrower | 21 Lakon St       |           | Torrance   | California |
| 10400     | Kerry      | Ogden     | Borrower | 501 11th Ave      |           | Calisbad   | California |
| 10391     | Rita       | Pedreira  | Borrower | 2033 Havenwood    |           | San Diego  | California |
| 10433     | May        | Ramon     | Borrower | 5039 Riverdale A. |           | Riversdale | California |
| 10009     | Goran      | Stijacic  | Borrower | 12396 World Tra.  | Suite 309 | San Diego  | California |
| 10452     | Maici      | Thomas    | Borrower | 7858 Creekside    |           | San Diego  | California |

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# Mortgage Industry Specific Products

- Set up automated marketing campaigns
- Send broadcast email, fax or regular mail marketing information
- Analyze results and generate customized reports
- Access your data from anywhere



The image shows a screenshot of a software application window titled "Uniform Residential Loan Application". The window contains a form with various fields and sections. On the left, there is a "Document Outline" pane with a tree view showing sections like "Type And Terms", "Information And Purpose", "Borrower Information", etc. The main form area is titled "Uniform Residential Loan Application" and contains the following sections:

- Introduction:** "This application is designed to be completed by the applicant(s) with the Lender's assistance. Applicants should complete it must also be provided (and the appropriate box checked) when:"
  - The income or assets of a person other than the "Borrower" (including Borrower's spouse) will be used as a basis for
  - The income or assets of the Borrower's spouse will not be used as a basis for loan qualification, but his or her liability state, the security property is located in a community property state, or the Borrower is relying on other property located
- I. TYPE OF MORTGAGE AND TERMS OF LOAN:**
  - Mortgage Applied for:  VA  Conventional  Other
  - FHA  FinHA
  - Amount: \$ 475000
  - Interest Rate: 6.25 %
  - No. of Months: 360
  - Amortization Type: [dropdown]
- II. PROPERTY INFORMATION AND PURPOSE OF LOAN:**
  - Subject Property Address: 1411 Torrance Blvd
  - City: Torrance
  - Legal Description of Property (attach description if necessary):
  - Purpose of Loan:  Purchase  Construction  Other (explain):
  - Refinance  Construction-Permanent
- Complete this line if construction or construction-permanent loan.**

| Year Lot Acquired | Original Cost | Amount Existing Liens | (a) Present Value of lot |
|-------------------|---------------|-----------------------|--------------------------|
|                   |               |                       |                          |
- Complete this line if this is a refinance loan.**

| Year Acquired | Original Cost | Amount Existing Liens | Purpose of Refinance |
|---------------|---------------|-----------------------|----------------------|
| 1999          | 525000        |                       |                      |
- Title will be held in what Name(s):
- Manner in which Title will be held
- Source of Down Payment, Settlement Charges and/or Subordinate Financing (explain)

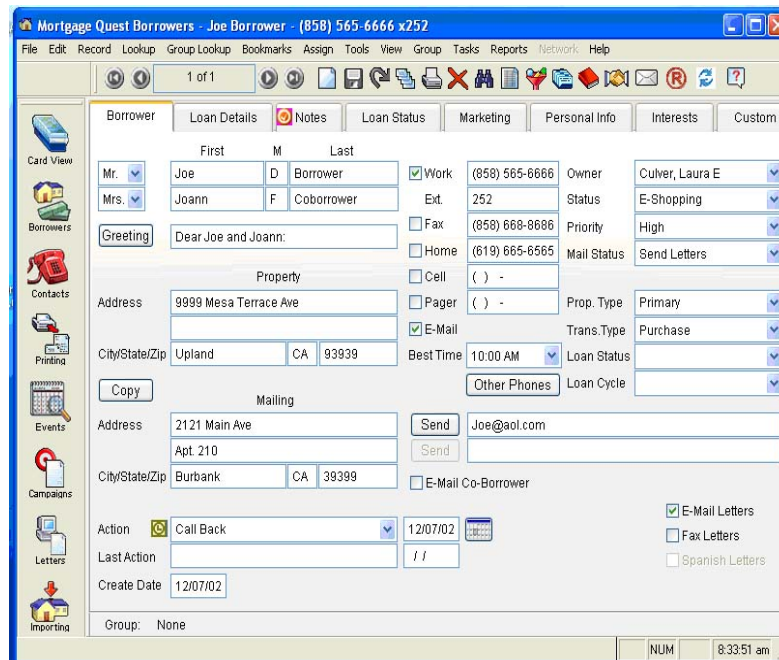
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# Mortgage Industry Specific Products

## – Mortgage Quest

- Market to prospects and past clients using automated system
- Create marketing campaigns
- Choose best communication method for each client



The screenshot displays the 'Mortgage Quest Borrowers' software interface. The window title is 'Mortgage Quest Borrowers - Joe Borrower - (858) 565-6666 x252'. The interface includes a menu bar (File, Edit, Record, Lookup, Group Lookup, Bookmarks, Assign, Tools, View, Group, Tasks, Reports, Network, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Borrower:** Fields for First Name (Joe), Middle Initial (D), Last Name (Borrower), and Co-borrower (Joann, F). Includes checkboxes for Work, Ext. (252), Fax, Home, Cell, and Pager.
- Property:** Address (9999 Mesa Terrace Ave), City/State/Zip (Upland, CA, 93939).
- Mailing:** Address (2121 Main Ave, Apt. 210), City/State/Zip (Burbank, CA, 39399).
- Actions:** Call Back (12/07/02), Last Action (11), Create Date (12/07/02).
- Other Fields:** Greeting (Dear Joe and Joann), Best Time (10:00 AM), Other Phones, Loan Status, Loan Cycle, Prop. Type (Primary), Trans. Type (Purchase), Mail Status (Send Letters), Priority (High), Status (E-Shopping), Owner (Culver, Laura E).

On the left side, there is a vertical toolbar with icons for Card View, Borrowers, Contacts, Printing, Events, Campaigns, Letters, and Importing. At the bottom right, there is a status bar showing 'NUM' and '8:33:51 am'.

  
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# Mortgage Industry Specific Products

- Import from 1003
- Email directly from Mortgage Quest
- Integrated with Outlook to organize appointments and tasks
- Works with:
  - Loan Officer Plus
  - Calyx Point
  - Byte Qualifier Series
  - Loan Soft 4.0 & 5.0

The screenshot displays the 'Mortgage Quest Borrowers' software interface. The window title is 'Mortgage Quest Borrowers - Joe Borrower - (858) 565-6666 x252'. The interface is divided into several sections: 'Borrower', 'Loan Details', 'Notes', 'Loan Status', 'Marketing', 'Personal Info', 'Interests', and 'Custom'. The 'Personal Info' section is currently active, showing two borrower profiles side-by-side. The left profile is for 'Joe's Plumbing' and the right profile is for 'Boeing'. Both profiles include fields for SSN, Gender, Employer, Position, Ethnicity, Mar. Status, FICO, Yrs. on Job, and Self Employed status. The bottom section of the interface shows 'Anniv.', 'Total Inc.', 'Total Debt', and 'Debt Ratio' for both borrowers, along with a table for 'Child' information.

| Field             | Joe's Plumbing   | Boeing  |
|-------------------|--|---|
| SSN               | 225-55-5555  | 555-55-5555                                       |
| Gender            | Male   | Female  |
| Employer          | Joe's Plumbing<br>3939 Elk Grove Ct.<br>Upland, CA 93231 | Boeing<br>8776 El Cajon Blvd<br>Ontario, CA 93999 |
| Position          | owner  | Analyst   |
| Ethnicity         | Caucasian  | Caucasian   |
| Mar. Status       | Married  | Married   |
| FICO              |  |   |
| Yrs. on Job       | 6  | 3   |
| Self Employed     | <input checked="" type="checkbox"/>                      | <input type="checkbox"/>                          |
| Anniv.            | 06/26/03   |   |
| Birthdate         | 12/18/02   | 09/20/02  |
| Age               | 28   | 25  |
| Total Inc.        |  |   |
| Total Debt        |  |   |
| Debt Ratio        |  |   |
| Child Information |  |   |
| Name              | Birthdate  | Age   |
| Child: Mary       | ///  | 1   |
| Child:            | ///  |   |
| Child:            | ///  |   |



# Database Software Add-ons

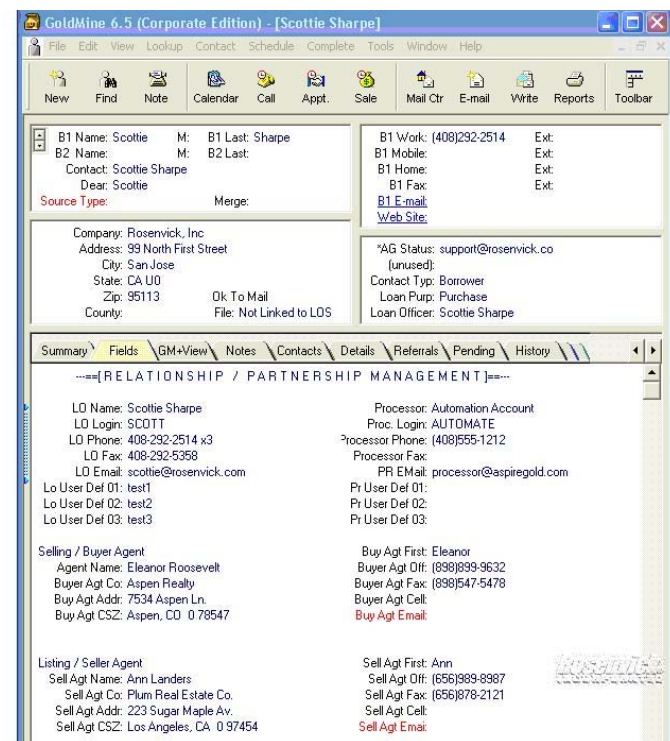
- TransACT! for ACT!
  - Customize layout or use canned template
  - Auto scheduler
  - Attach photos, scanned items
  - Enter zip code and city, state and area codes filled in automatically

The screenshot displays a web-based form titled "Contact Info". The form is organized into several sections with labels and input fields:

- Company:** Your Company, Contact: Your Name, Substation: Your
- Address:** Your Address, City, State, Zip
- Phone:** Phone (800-995-1212), Ext., Fax, Mobile, AR 2 Phone, ID/Status
- Other Info:** Title, City, State, Country (United States), Referred By, Web Site, E-mail, Last Results
- Loan/Account Info:** AR 1, AR 2, exist 1st lender, exist 1st loan #, Sales Price, New Loan Amt., New Loan Type, New Loan PI, Closing Date, exist 1st term, Last Reach, Create Date (8/25/2001), Last Meeting, Edit Date (9/3/2002), Last Attempt, Merge Date, Public/Private, Record Creator, Record Manager (TA)

The interface includes a navigation bar at the bottom with tabs for "History", "Activities", "Sales/Opportunities", "Groups", "Library", "Contact Info", "Personal", and "All Contacts". The status bar at the bottom right shows "Contact Layout: 10246760" and "<No Group>".

# Database Software Add-ons

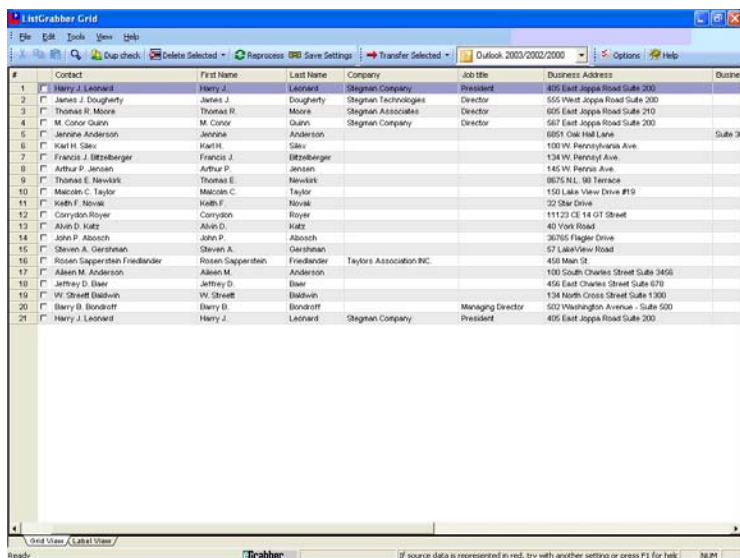


- AspireGold™ for Goldmine
  - Automatically imports web loan apps into Calyx Point or other LOS
  - Link borrowers to transaction parties
  - Automate marketing systems

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# Database Software Add-ons



| #  | Contact | First Name         | Last Name   | Company                 | Job Title         | Business Address                    | Business |
|----|---------|--------------------|-------------|-------------------------|-------------------|-------------------------------------|----------|
| 1  | ✓       | Henry J.           | Leonard     | Stegnen Company         | President         | 405 East Joppa Road Suite 200       |          |
| 2  | ✓       | James J.           | Dougherty   | Stegnen Technologies    | Director          | 555 West Joppa Road Suite 200       |          |
| 3  | ✓       | Thomas R.          | Moore       | Stegnen Associates      | Director          | 605 East Joppa Road Suite 210       |          |
| 4  | ✓       | M. Connor          | Quinn       | Stegnen Company         | Director          | 587 East Joppa Road Suite 200       |          |
| 5  | ✓       | Jenette            | Anderson    |                         |                   | 6851 Oak Hill Lane                  | Suite 30 |
| 6  | ✓       | Karl H.            | Saks        |                         |                   | 100 W. Pennsylvania Ave.            |          |
| 7  | ✓       | Francis J.         | Bittsberger |                         |                   | 134 W. Pennsylvania Ave.            |          |
| 8  | ✓       | Arthur P.          | Jensen      |                         |                   | 145 W. Penns. Ave.                  |          |
| 9  | ✓       | Thomas E.          | Newkirk     |                         |                   | 8675 N.E. 98 Terrace                |          |
| 10 | ✓       | Maureen C.         | Taylor      |                         |                   | 150 Lake View Drive #19             |          |
| 11 | ✓       | Kath F.            | Novak       |                         |                   | 22 Star Drive                       |          |
| 12 | ✓       | Corrydon           | Royer       |                         |                   | 11123 CE 14 01 Street               |          |
| 13 | ✓       | Alvin D.           | Katz        |                         |                   | 40 York Road                        |          |
| 14 | ✓       | John P.            | Abosch      |                         |                   | 36705 Flagler Drive                 |          |
| 15 | ✓       | Shawn A.           | Gershman    |                         |                   | 57 LakeView Road                    |          |
| 16 | ✓       | Rossan Sapperstein | Friedlander | Taylor's Association,NC |                   | 458 Main St.                        |          |
| 17 | ✓       | Allen M.           | Anderson    |                         |                   | 100 South Charles Street Suite 3456 |          |
| 18 | ✓       | Jeffrey D.         | Basar       |                         |                   | 456 East Charles Street Suite 070   |          |
| 19 | ✓       | W. Stewart         | Baldwin     |                         |                   | 134 North Cross Street Suite 1300   |          |
| 20 | ✓       | Barry B.           | Bondoff     |                         | Managing Director | 503 Washington Avenue - Suite 500   |          |
| 21 | ✓       | Henry J.           | Leonard     | Stegnen Company         | President         | 405 East Joppa Road Suite 200       |          |

- List Grabber for Outlook, ACT!, Goldmine, Excel
  - Pull contact data from documents, email signatures, spreadsheets
  - Extract email addresses from anywhere

# Product Web Site Addresses

- Cimmaron Mortgage Manager
  - [www.cimmaronsoftware.com](http://www.cimmaronsoftware.com)
- Mortgage Quest
  - [www.emarketfocus.com](http://www.emarketfocus.com)
- TransACT!
  - [www.actaddons.com/products/](http://www.actaddons.com/products/)
- AspireGold
  - [www.aspiregold.com](http://www.aspiregold.com)
- List Grabber
  - [www.egrabber.com](http://www.egrabber.com)



# Ways to Use a Database

- Maintain all client contact data in one place
- Set up email or letter campaigns to trigger at certain times/events
- Set up reminders for important dates
- Track results from marketing campaigns
- Identify those who are your best referral sources
- Track loan status and prospecting status
- Maintain appointments and to do items

# Which Database is Right for You?

- When choosing your database, it's important to ask yourself what you want from your database AND how much you're willing to put into it.
- A database is only as good as the information it contains.
- If it's not kept current, your database has little to no value.

# Key Take Aways

- You know more people than you think when constructing your personal sphere list.
- Sub-divide your database so that you're spending your marketing dollars wisely.
- Databases provide a systematic way to organize and categorize data.



# Key Take Aways

- Identify exactly what you want your database to do for you to choose the best software product.
- Make the commitment to keep your database current – out of date information is worthless.
- A well-maintained database that is used regularly will help your business thrive.

# Thank You!

For more information:

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