Driving Revenue With Custom Mortgage Presentations

The 3 keys for companies of any size to benefit from presentation + custom content automation.

In fast-moving industries like the mortgage marketplace, there are dozens of choices for tech. Teams want tools that can align sales + marketing, shorten sales cycles, and help close deals. Unfortunately, this can cause some tension or "analysis paralysis". Betting resources on tools that tout AI capabilities or machine-learning offer a high barrier to easy adoption. For many organizations, a presentation platform offers the best chance of a speedy ROI.

When picking a presentation platform, specifically in the mortgage space, there are 3 keys that drive revenue acceleration:

- **Swift + intuitive onboarding + rollout**
- **Easy day-to-day usage**
- **Content automation based on user decisions— not artificial intelligence**

Intuitive Onboarding

The mortgage industry is typically less forward with tech. The longer it takes to change, the longer it takes to see results. If an office misses opportunities for a season or more, the effects can be dire.

Opting for tech with a full team of designers, trainers, and on-demand customer support is ideal. It's even better when the onboarding process takes 2-3 weeks.

Ease of Use

The average loan officer spends 10+ hours a week editing + re-formatting their sales decks to create custom content. If they can reduce the time + clicks it takes to make tailored content, they can spend more time doing what they do best.

With cloud-based presentation platforms, loan officers + originators are making perfectly branded presentations in 1/10 the time using guided selling + notifications for whenever it's viewed.

Intuitive Content Automation

As mentioned before, AI + Machine Learning can go very far for businesses in terms of automation. But, with the average deal sizes for mortgage companies, relying on calculations alone isn't enough. Intuitive + user-based content automation uses a system built for the people who use it. Custom content generates automatically, but the results are based on interactions with people—not just equations.

ROI built on Exceeding Expectations

With a presentation platform that's easy to use, teams are more efficient. If that presentation platform is connected to their CRM, even better. Users can automatically populate decks with contact info, and update on the fly. If the presentations are just as easy to use for demand generation and marketing, the two teams connect in a single, intuitive, cloud-based tool.

The solutions that meet the needs of the mortgage market already exist. Finding the right fit means aligning your goals with proven principles that drive results. Cloud-based presentation platforms like Digideck offer the kind of ease of use, intuitive guided selling, customization, and onboarding timelines that the marketplace has been looking for.