

# closesimple<sup>TM</sup>



# Product Overview

1. Communication Strategy Overview (Why CloseSimple)
2. Client Experience
  - Proactive Communications
  - On Demand Portal
3. Software Integrations
4. Our Proven Implementation Process
5. Contact Information

There are three core communication strategies:



## 90% of the Industry is here:

*Providing excellent customer service, but constantly answering emails and phone calls.*



## CloseSimple is Leading in Proactive & On Demand Communications:



**Proactive**

**On Demand**

**Reactive**

Moving your communication strategy ***from Reactive to On Demand and Proactive*** can have a dramatic effect on your business.

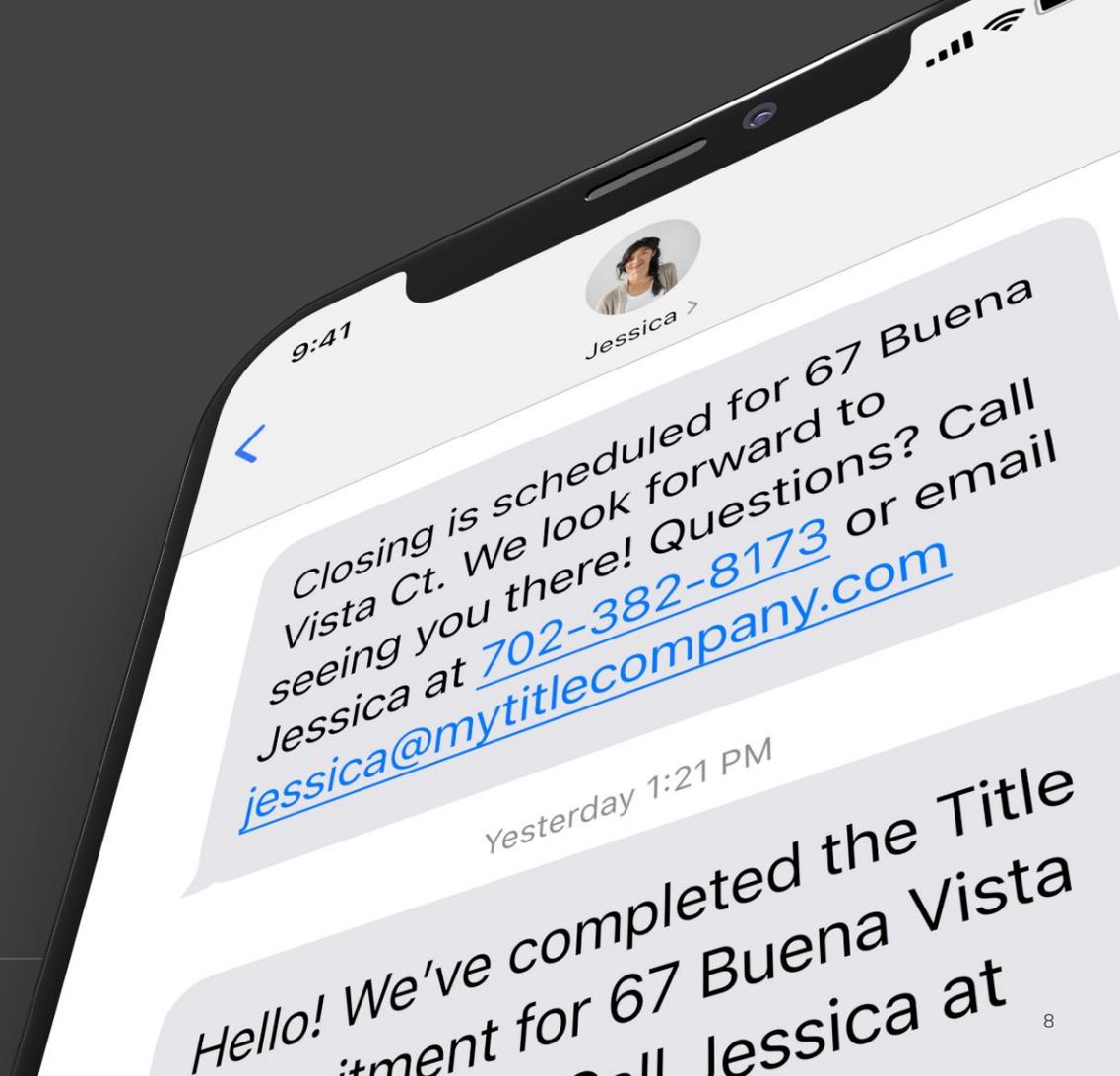


# 1. Save Time & Increase Efficiency

*CloseSimple takes the guesswork out of sending communications  
and will decrease inbound "noise."*

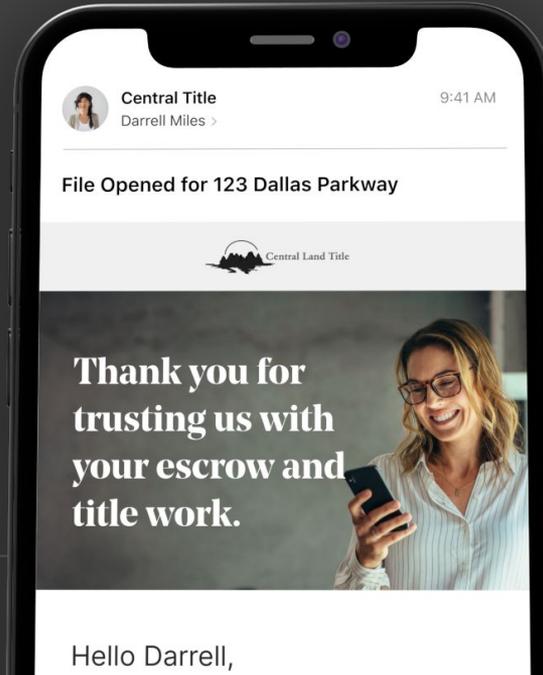
“We saw a 20%  
reduction of  
inbound phone  
calls within the  
first 90 days.”

– Large CloseSimple  
Client



“One of our largest brokers told us they call us 75% less since we implemented CloseSimple.”

– Small CloseSimple Client

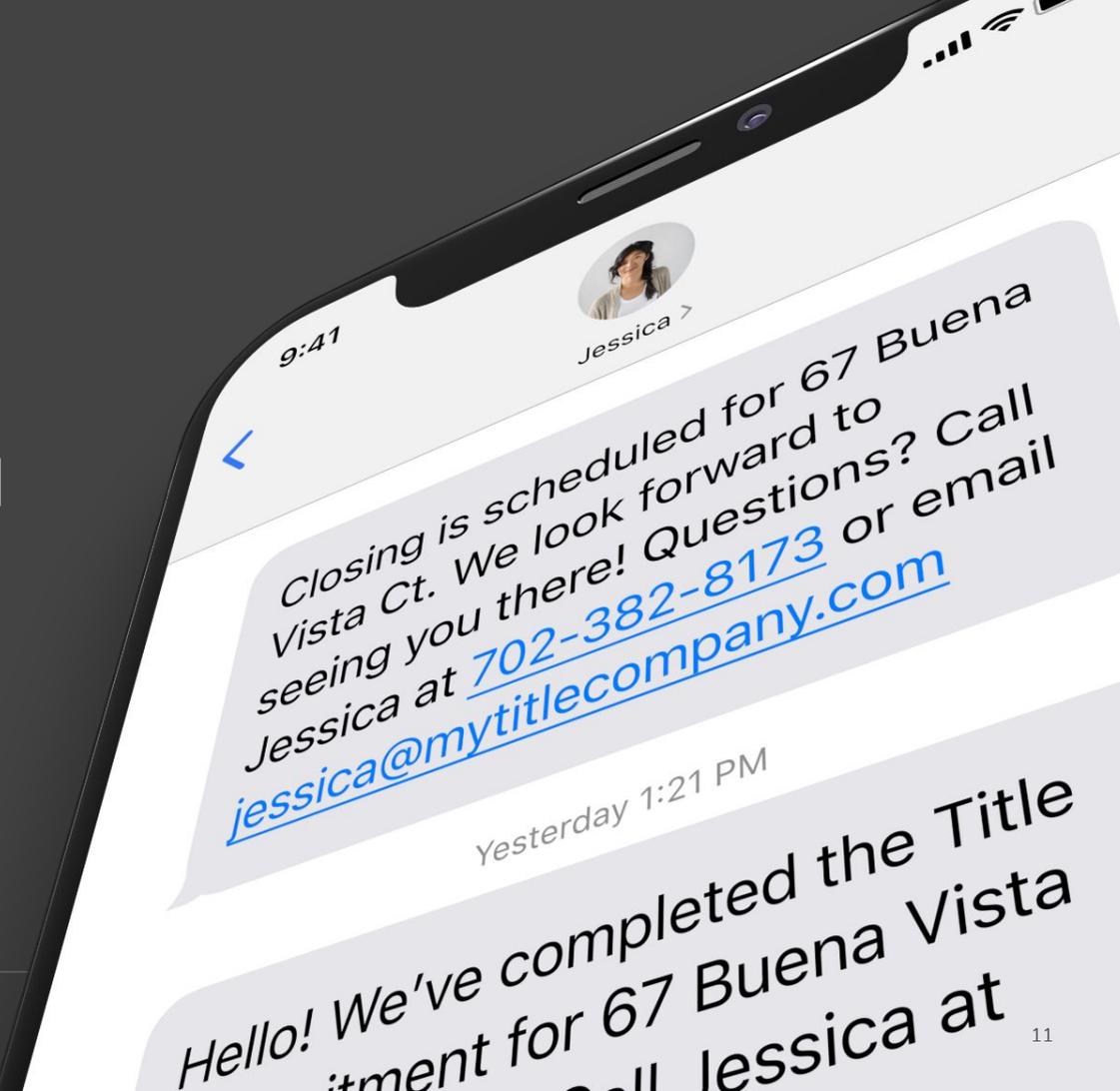


## 2. Increase Revenue

*CloseSimple differentiates you from the title company down the street and gives your sales/marketing teams a leg up against the competition.*

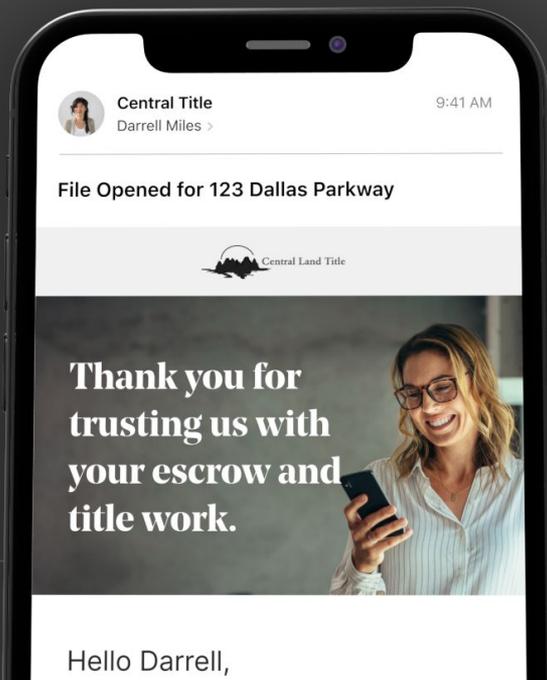
“I showed a broker prospect our Emails & Texts and I walked out with 20 new deals/month!”

– CloseSimple Client

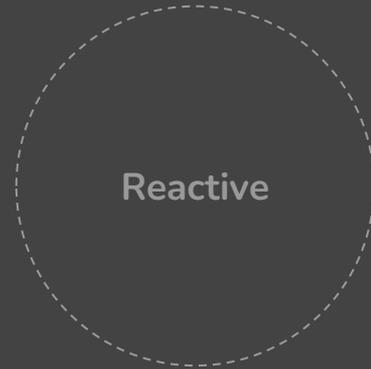


“I handed the brochure you made us to a new loan officer, we shook hands, and I had the business!”

– CloseSimple Client



# How We Do It

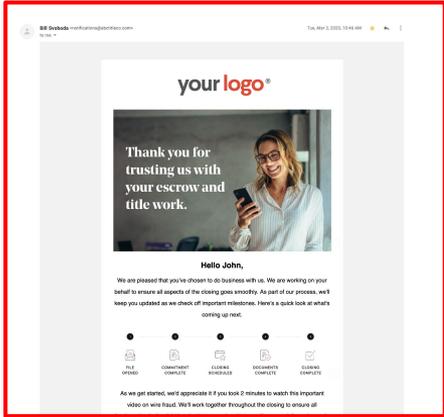




Proactive

# Branded Emails + The Pizza Tracker for Title<sup>®</sup>

*Our emails are customized to our client's brand & include a customized "Pizza Tracker for Title," delivering a customized, visual experience that lets Realtors, Lenders, Buyers, and Sellers know exactly where you are at in the closing process.*



**Hello John,**

We are pleased that you've chosen to do business with us. We are working on your behalf to ensure all aspects of the closing goes smoothly. As part of our process, we'll keep you updated as we check off important milestones. Here's a quick look at what's coming up next.

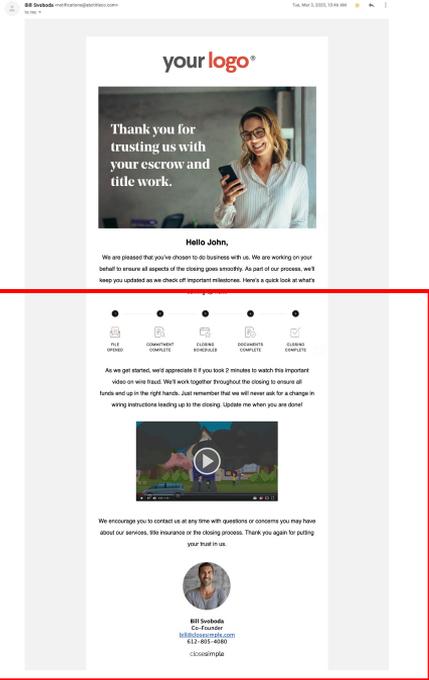


As we get started, we'd appreciate it if you took 2 minutes to watch this important video on wire fraud. We'll work together throughout the closing to ensure all funds end up in the right hands. Just remember that we will never ask for a change in wiring instructions leading up to the closing. Update me when you are done!





Proactive



Keep you updated as we check off important milestones. Here's a quick look at what's coming up next.



As we get started, we'd appreciate it if you took 2 minutes to watch this important video on wire fraud. We'll work together throughout the closing to ensure all funds end up in the right hands. Just remember that we will never ask for a change in wiring instructions leading up to the closing. Update me when you are done!



We encourage you to contact us at any time with questions or concerns you may have about our services, title insurance or the closing process. Thank you again for putting your trust in us.



**Bill Svoboda**  
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612-805-4080

closestimple



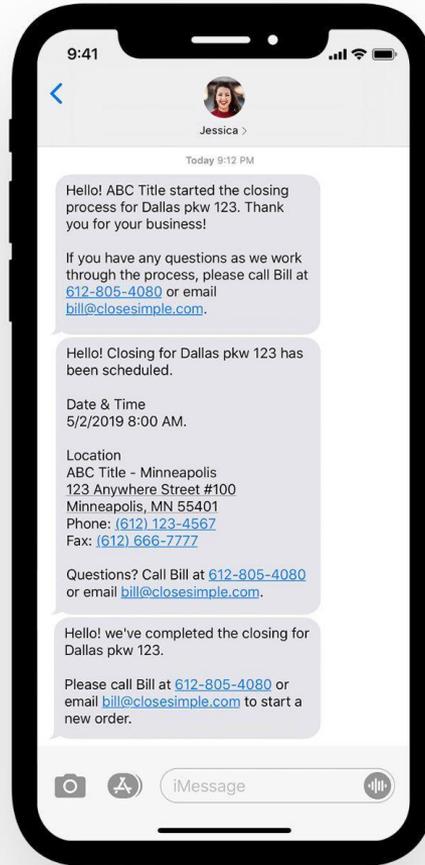
Proactive

# Text Messages

*Designed to accompany email updates & ensure that your Realtors, Buyers, and Sellers never miss an update from you again.*



Proactive





Proactive

On-Demand

Reactive



On-Demand

# Client Portal

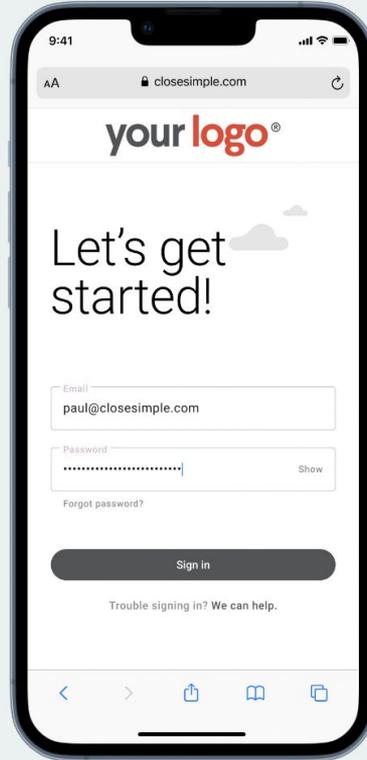
*Providing On Demand access to view ALL open orders for Realtors, Lenders, Buyers, and Sellers (especially investors)*



On Demand

### CloseSimple Portal

- Fully White-labeled
- Streamlined authentication
- Unique profiles for all user types: Buyers, Sellers, Realtors, Lenders, Attorneys, Sales Reps, Etc.
- Utilizes facial recognition for authentication on most phones

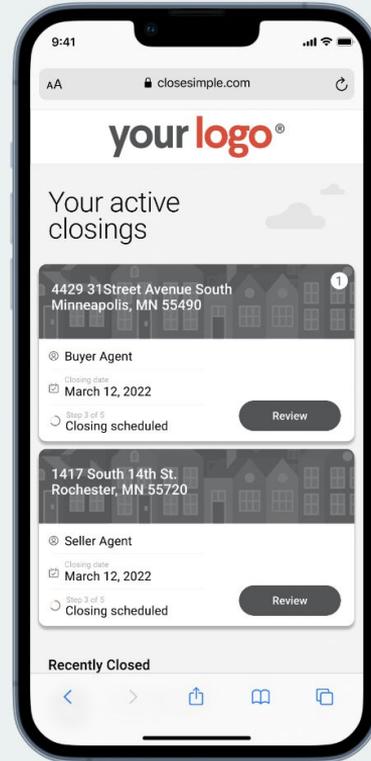




On Demand

### Heads Up Display:

- One place for your Realtors/Investors/Lenders to get a snapshot of their transactions
- View all active and recently closed transactions

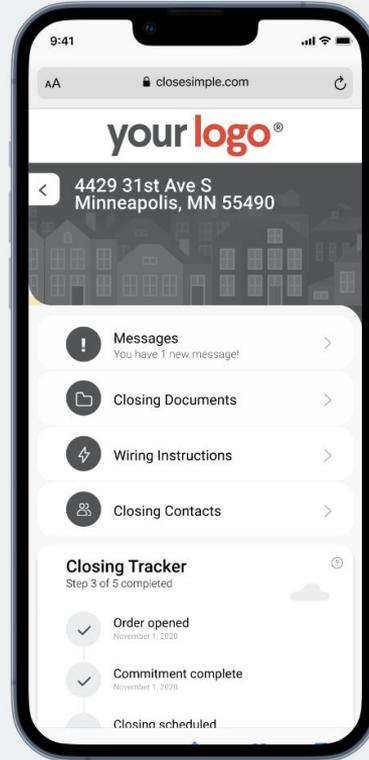




On Demand

**Available features include:**

- Secure Messaging
- Secure Document Delivery
- Secure Document Upload to your Title Production Software
- Secure Wiring instructions delivery
- Visibility to all Closing Contacts
- Status Tracker
- Closing Details

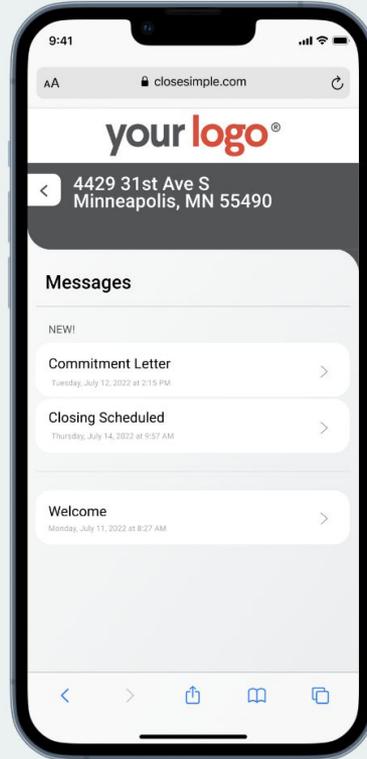




On Demand

### Secure Messaging

- Deliver all (or some) of your communications directly through the portal
- Get critical information OUT of email

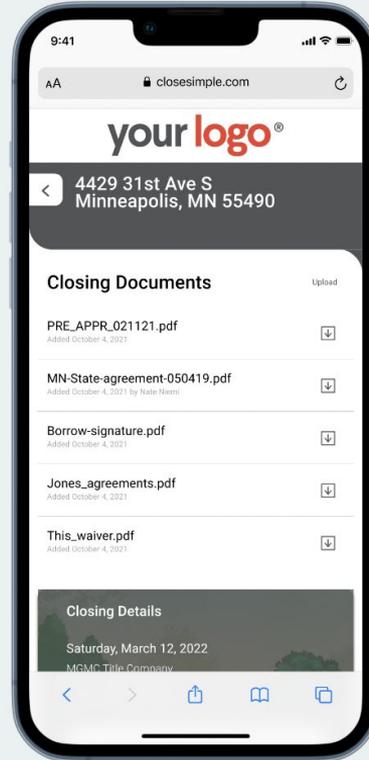




On Demand

### Secure Document Delivery & Upload

- Give your clients access to all documents related to the transaction in one place
- Request documents to be securely uploaded directly to your Title Production Software

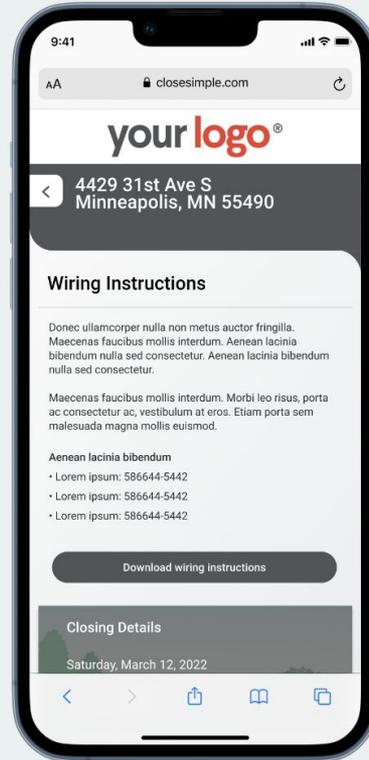




On Demand

### Secure Wiring Instructions

- Provide ONE Place for your Realtors, Lenders, Buyers, and Sellers to retrieve your wiring instructions
- Securely Stored within the CloseSimple AWS Vault

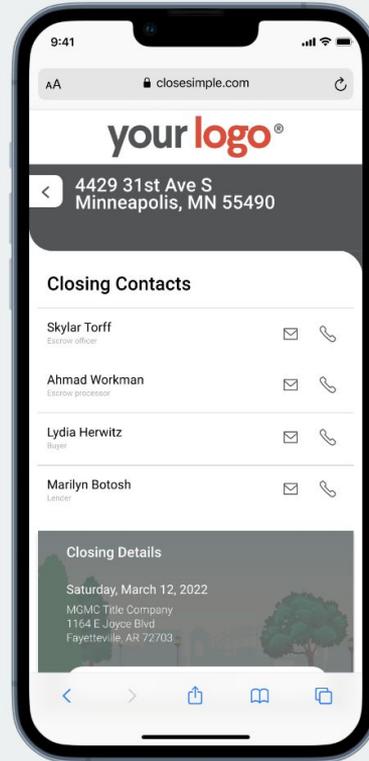




On Demand

### Closing Contacts

- Get easy access to view closing contacts working on the transaction
- Variable lists by role
- Quickly call or email out of the portal

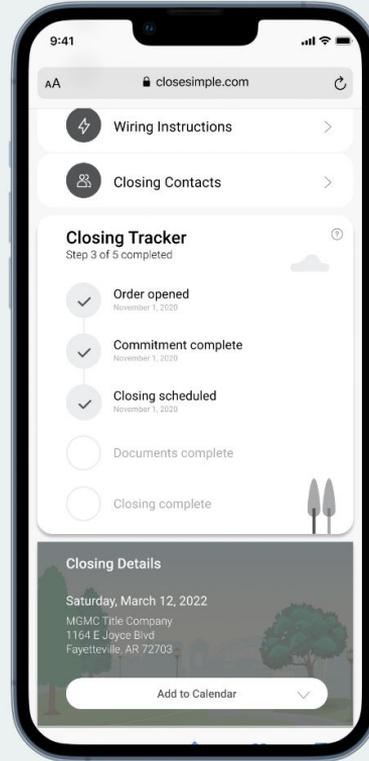




On Demand

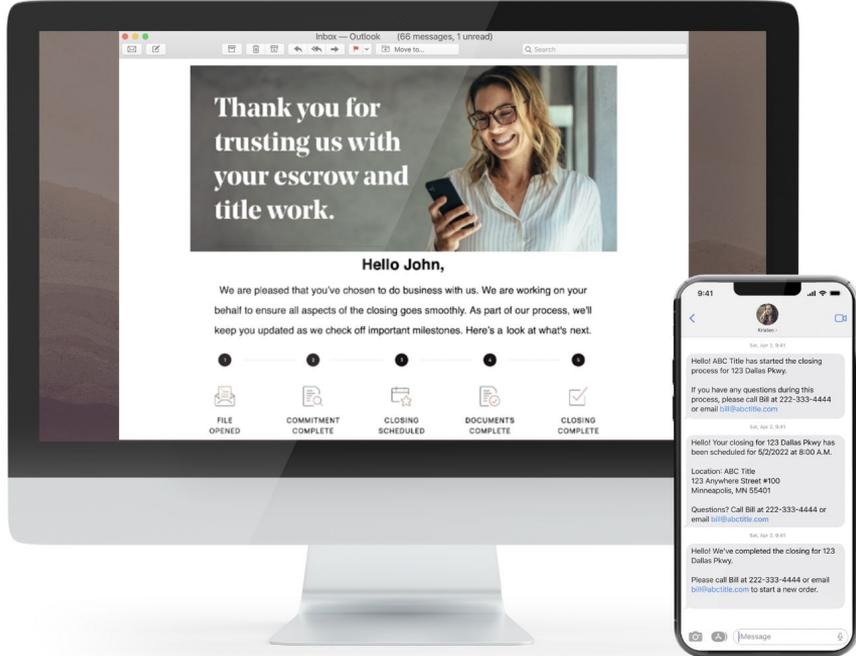
### Status Tracker and Closing Details

- See what's been completed and what's coming up next on your transaction
- Closing Details available on every page within the portal.

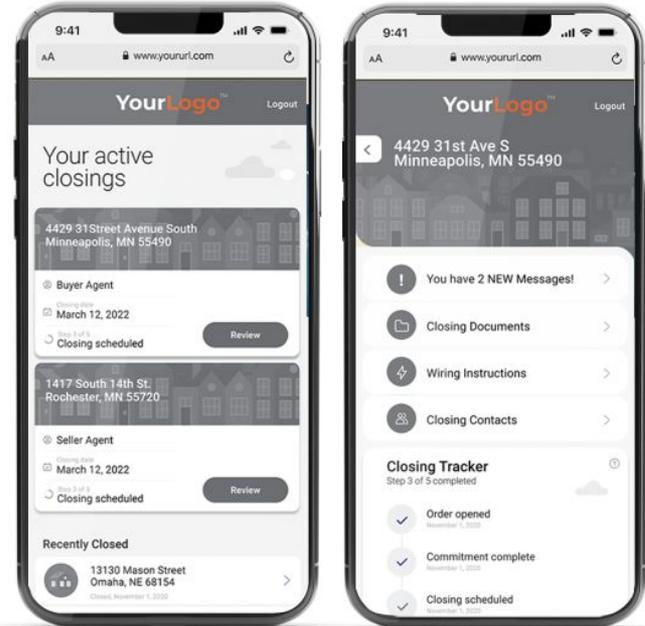




## Proactive Communications



## On-Demand Portal



# Driven by Real-Time Automation

*CloseSimple is fully automated on most systems to minimize effort for Escrow Teams & ensure that Realtors, Lenders, Buyers, and Sellers are updated in real time, immediately after a status is updated.*

# On Industry-leading Software:

*Click the Logo to view a demo of CloseSimple on each platform:*

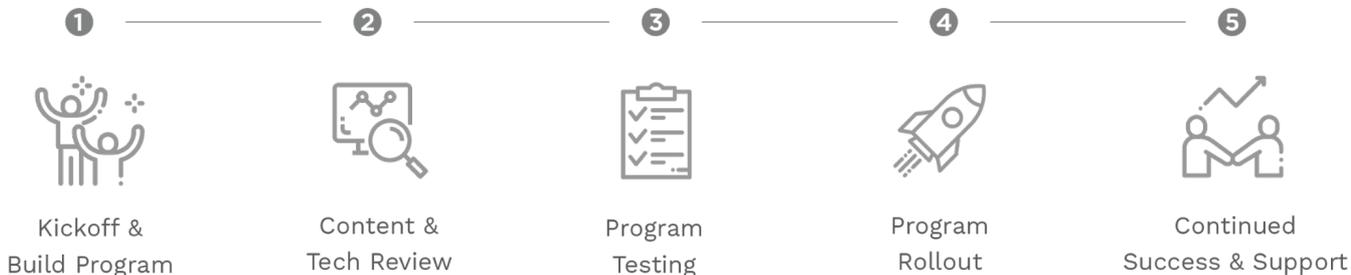


ResWare™



# And our Proven Process

*Designed to get you in and out of implementation quickly with support for the long-term, our proven process leverages our 7 years of experience delivering communications solutions for Title Companies, Escrow Companies, and Real Estate Attorneys.*



# Contact Information

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