5 Ways to Use Power Calls to Grow Your Business

When setting up Power Calls, the Surefire Administrator establishes what will trigger a Power Call to be scheduled.

With one click, the Loan Officer can dial down all of their Power Calls, one after the other. It's like having an assistant monitoring your contacts and telling you who to call when and why, each and every day!

Power Calls by Surefire saves the Loan Officer and their Sales Manager hours per week by surfacing opportunities, dialing, scheduling and reporting on call activity.

5 Ways to Use Power Calls to Grow Your Business

1 Using Power Calls for Lead Management

Whether your leads come from your own website, a partner's website, a mobile app such as SimpleNexus, Zillow, Bankrate, LendingTree and more, you can utilize Power Calls to nurture your leads.

Some cold lead sources might require you to be more aggressive and others less so. For example, if your Zillow Leads need to be called right away, the call can be scheduled immediately. If you do not get in touch with the lead, another call can be scheduled on day 1, 2, 3 and so forth.

How It Works

The Surefire rules engine looks constantly for leads that meet set criteria, for example, the contact's source is Zillow. Once a contact is detected that meets the criteria the Power Call is automatically scheduled for you (the Loan Officer).

2 In Process Deals

While Surefire does an amazing job at updating your in-process clients and deal partners by email, text, and video, there are many times when a phone call is appropriate as well. During the loan process, at any milestone where a phone call would be appropriate, Power Calls can automatically schedule themselves. This alleviates the Loan Officer's burden of trying to remember who to call when.

How It Works

The Surefire rules engine looks constantly for contacts in a deal and/or sales process that meet set criteria, for example, the appraisal has come in. Once a contact is detected that meets the criteria the Power Call is automatically scheduled for you (the Loan Officer).

3 Post-Close

As you well know, Surefire is powerful when it comes to post-close communication — whether you are keeping in touch via email, SMS, or postal mail — you can do it all inside surefire. There are times after the deal has closed where it is appropriate to make a phone call.

Examples include: a check-in one month after purchase or refinance; 3, 6, or 9 months after purchase or refinance; and at every loan anniversary.

Beyond clients, on a purchase transaction, it may be appropriate to schedule follow up calls with the Real Estate Agent on both sides of the transaction to help grow your future business.

How It Works

The Surefire rules engine looks constantly for contacts with a funded deal that meets set criteria, for example, purchase. Once a contact is detected that meets the criteria the Power Calls (in this case a purchase, it may be 3 Power Calls, one for the contact, one for the buying agent, one for the listing agent) are automatically scheduled for you (the Loan Officer).

4 Referral Relationships

No doubt your current referral partners are pleased with the regular communication automatically coming from Surefire during the loan process, but what about new referral relationships? Power Calls can also be scheduled to help cultivate and nurture any new relationship. Beyond real estate agents, Power Calls can be used to nurture attorneys, CPAs, Human Resource representatives, and more.

How It Works

The Surefire rules engine looks constantly for referral sources that meet set criteria, for example, the contact's type is 'Referral Source CPA' . Once a contact is detected that meets the criteria the Power Call is automatically scheduled for you (the Loan Officer).

5 Recruiting

From emails to stunning recruiting ebooks, Surefire is a great solution to help you recruit new talent to your organization. Adding Power Calls to your process can help you manage all the follow-up calls you need to make.

How It Works

The Surefire rules engine looks constantly for contacts that meet set criteria, for example, the contact's type is 'Recruit – New'. Once a contact is detected that meets the criteria, the Power Call is automatically scheduled for you.

Bonus: Use Power Calls to Track Business Growth

Power Calls has smart reporting built right in and automatically tracks the number of calls attempted, completed, voicemails left and more.

Use Power Call reporting to track your own business activity against your own goals. For example, if you know you need to make 100 calls per week to meet your income goal you can see right in the Power Calls report whether you are on or off track.

How It Works

Surefire tracks every call that is attempted, connected, skipped and voicemails left. Navigating to Reports > Power Calls, you can quickly see your call activity by week, month, year or custom date range.

Managers

Surefire has been making marketing easy for over 15 years. Now with Power Calls, Surefire makes tracking your teams' sales activities easy, too.

Under Reports > Power Calls you can quickly see who is honoring their hour of power, enabling you to make swift course corrections in your organization.