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Guild Mortgage Launches Guild 360; Advanced Integrated Sales and Marketing Platform Allows Loan Officers to Better Serve Customers

Combines Salesforce Sales Cloud and Pardot with Guild's proprietary internal systems to make the lending process better, faster and more efficient

SAN DIEGO--(BUSINESS WIRE)-- [Guild Mortgage](#), one of the largest independent mortgage lenders in the U.S., has launched Guild 360, an innovative sales, marketing and customer relationship management platform powered by [Salesforce](#). With Guild 360, company loan officers have a comprehensive array of new information support tools to better connect with each customer and enhance their individual borrowing experience.

Guild's technology, sales and marketing teams worked to define this new model of sales enablement to ensure it would be innovative for the mortgage industry and allow the company's loan officers to deliver an unequalled level of service and engagement with their customers. It integrates the Salesforce Sales Cloud and Pardot marketing capabilities with Guild's proprietary systems and processes, including the Guild sales platform, loan origination system and [MyMortgage](#), its digital mortgage portal.

Guild 360 gives the company's loan officers a single reliable source for maintaining current homebuyer information, aiding them throughout the lending process and specific to each customer lifecycle. The platform is integrated to Guild's servicing platform, allowing for better communication with homebuyers after each loan closes.

"Guild 360 was designed to provide our customers with a more attentive and efficient lending experience," said Mary Ann McGarry, president and CEO. "It gives our loan officers a single snapshot for each homebuyer and the personalized technology to create more meaningful connections to serve individual customer needs. This high-tech, high-touch experience builds on the culture of customer service excellence that has distinguished Guild Mortgage for more than 55 years."

With a single sign-on to Guild 360, Guild's loan officers and their teams have instant digital access from anywhere to current, accurate customer data, including contact information, loan details, stage of the loan in the lending process and any previous communications – in real time and on mobile devices or tablets.

"With a complete view of each customer at their fingertips, wherever they are, our loan

officers will be even more effective and responsive in serving their homebuyers,” said Gabe Minton, executive vice president and chief information officer. “Guild 360 makes the lending process faster and more efficient, which ultimately provides our customers with a better experience.”

The integrated platform features an array of task functions such as automated workflows, collaborative communication capabilities, email synchronization and personalized dashboards to help loan officers better manage their customer relationships. Minton said more accurate data and information about each borrower’s individual situation will help Guild keep customers for life.

The platform enables loan officers to choose how to best communicate with their customers and market new loan products and services through the use of email templates, educational campaigns that can be scheduled electronically, print collateral and custom videos.

Guild 360 offers features that empower the company’s [mortgage loan officers](#), real estate agents and other strategic partners to work better together, offering new products and ideas with content approved by Guild’s compliance experts. By seamlessly connecting customer, transaction and referral data in one system, Guild loan officers gain analytical insights to make more informed business decisions. Detailed reports and dashboards ensure accurate status updates for each customer and any loan at any time, completing the 360-degree experience.

"Technology is changing customer expectations across all industries," said Rohit Mahna, SVP and general manager of financial services at Salesforce. "With Salesforce, Guild Mortgage has built an innovative solution that will empower its loan officers to deliver the fast, personalized lending experience today's borrowers expect. This solution will give them a competitive advantage in meeting the needs of homebuyers and attracting successful loan officers alike."

A top-10 national lender by purchase loan volume, Guild offers first-time homebuyers a wide range of loan options and personalized service. Its loan professionals can serve the needs of any homebuyer, from helping first-time homebuyers achieve home ownership, often through government loan programs, to jumbo home loans. Guild also specializes in helping active duty and retired military personnel to secure VA loans, with 100-percent financing and flexible qualifying standards.

About Guild Mortgage

Founded in 1960 when the modern U.S. mortgage industry was just forming, [Guild Mortgage Co.](#) is a nationally recognized independent mortgage lender offering a wide range of residential mortgage products and local in-house processing, underwriting and funding. Its collegial and entrepreneurial culture enables it to deliver unsurpassed levels of customer service. Having been through every economic cycle, the company has grown 15-fold since 2007, and now has more than 4,000 employees and 250 branch and satellite offices in 27 states. Guild’s highly trained loan professionals are experienced in government-sponsored programs such as FHA, VA, USDA, low down payment assistance programs and other specialized loan programs. The company generated \$15.9 billion in loan volume in 2017, as compared to \$1.2 billion in 2007. In addition, Guild services more than 190,000 loans, which totaled \$38.6 billion in 2017. It has correspondent banking relationships with credit unions

and community banks in 47 states. (Equal Housing Lender- Company NMLS #3274).

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