



Industry:

Real estate technology

Website:

insellerate.com

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First Analysis invests in Insellerate, a leading customer engagement platform for mortgage lenders

Innovative marketing and sales engagement platform for the mortgage industry

CHICAGO – Feb. 17, 2022 – First Analysis, a leading venture capital investor, has made a new investment in Insellerate. Insellerate is a leading provider of customer relationship management (CRM) and marketing automation solutions for the mortgage lender and real estate sectors. The investment, led by longtime First Analysis partner Argentum Group, will expand Insellerate's product development, sales and marketing, and customer success initiatives and will be used to meet increasing demand for its enterprise customer experience platform.

As consumers have shifted online to shop for mortgages, it has become critical for mortgage lenders and servicers to develop a sustained digital engagement strategy for their customers. Insellerate's platform enables loan officers to engage more effectively, resulting in higher lead conversion rates, lower origination costs and more closed loans. Insellerate is among the first in any industry to deliver a complete CRM, lead management and engagement platform via a dynamic mobile application. This means users can access critical loan information without a computer or logging into a loan origination system, which radically improves borrower retention and conversion rates.

"This investment will enhance our ability to continue offering industry-leading technology and services that meet the growing needs of our ever-expanding customer base," said Josh Friend, founder and CEO of Insellerate. "We are excited to partner with First Analysis and Argentum as we pursue the large opportunity ahead of us."

First Analysis's long history of investing in digital marketing and enterprise productivity technology companies and publishing in-depth research on the sectors helped it understand Insellerate's great potential. "Sales enablement tools that make mortgage brokers more efficient and effective will become increasingly important in coming years. Insellerate provides a platform that will help brokers manage workflow and increase customer satisfaction with the entire mortgage process," said Terry Kiwala, vice president at First Analysis. "We look forward to partnering with Insellerate as the company enters its next phase of growth."

About First Analysis

First Analysis is a leading venture capital investor. We have one of the longest records in venture capital, having invested more than \$800 million across multiple highly diversified funds over four decades. First Analysis invests mainly in North America with a focus on our sectors of expertise: technology/SaaS, healthcare and environmental technology. We help established companies become profitable leaders in large markets, funding growth plans and working closely with management in areas including

strategy, recruitment, sales and marketing and corporate development. Our flexible approach targets investing \$3-10 million as lead investor or as a syndicate partner bringing valuable perspective.

About Insellerate

Insellerate, an innovative marketing and sales engagement platform for the mortgage industry, helps lenders close more loans through better borrower engagement. Insellerate delivers dynamic technology, strategy and content for every channel to ensure engagement throughout the borrower's journey. Insellerate integrates with the software powering lenders' business today and into the future. Insellerate is a highly scalable, configurable and modern platform that accelerates sales and generates repeat business. SOC 2 and SSAE 18 certified, Insellerate is built to satisfy the most closely regulated businesses, including banks with mortgage subsidiaries.