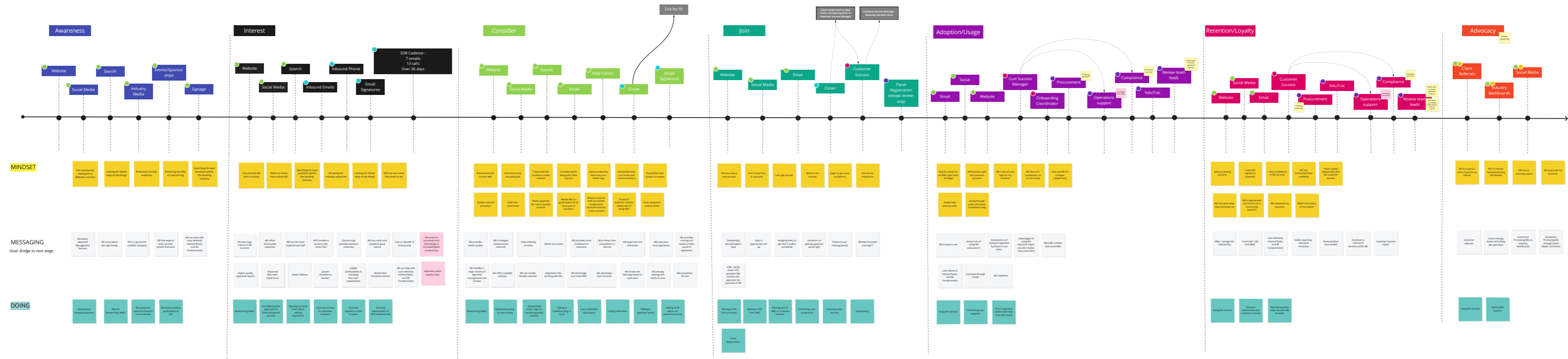


- Marketing
- Sales
- Cust Success
- Operations
- Customer Advocate

- Journey Stages**
- Awareness**
    - Doesn't know MountainSeed
    - May have heard of MountainSeed, but not sure of what we do
  - Interest**
    - Thinking about using an AMC or switching AMCs
    - Has heard of MountainSeed, but not aware of what we offer
  - Consider**
    - Considering outsourcing AM services or changing AMCs
    - Choosing between MountainSeed and other AMCs
  - Join**
    - Selects MountainSeed and becomes a MountainSeed customer
  - Adoption/Usage**
    - MountainSeed customer
    - Onboarding to MS tools
    - Starting to use MS services
  - Retention/Loyalty**
    - MountainSeed customer
    - Deciding whether to use other MS services
    - Deciding whether to remain a MS customer, move to competitor AMC, or in-house services
  - Advocacy**
    - MountainSeed customer
    - Loves working with MountainSeed so much that they recommend to others



**MINDSET**

Not necessarily looking for a different solution

Looking for better ways to do things

Browsing industry expertise

Browsing benefits of outsourcing

Searching for best practices within the banking industry

Has noticed MS and is curious

Wants to know more about MS

Searching for best practices within the banking industry

Browsing for industry expertise

Looking for better ways to do things

Still not sure what they want to do

Disatisfied with current AMC

Internal process not going well

Thinks that MS could be a viable solution

Considering MS along with other options

Open to idea that there may be a better way

Disatisfied with team time and communications

Disatisfied with quality of reviews

Nervous about new process

Don't know how to use tools

Let's get started

Wants to be trained

Eager to get users on platform

How do we implement

May be using MS (AMC) (open bank strategy)

AM business split with previous provider

MS Coms are too high for my customer

MS has lost competitors, so I'm not using

Only use MS for compliance assignments

Lame on buying decision

I need MS regulatory expertise

I have confidence in MS services

MS has enhanced their credibility

I have a great relationship with MS customer success

MS is in great! Thank I'll go get my friends

MS is creative, forward-thinking and flexible

MS has an amazing culture

MS improved my business

**MESSAGING**

MS offers Appraisal Management Services

MS cares about the right things

MS is a good and credible company

MS has experts and a proven system that work

MS can help with Loan demand, Interest Rates, and MS Fundamentals

MS has large volume of AM business

MS offers Nationwide expertise

MS has the most experienced staff

MS Provides a process that never fails

Outsourcing provides business continuity

MS has really nice people & good culture

Cost vs. Benefits of outsourcing

We invest in processes and technology to increase speed and productivity

MS provides better quality

MS is cheaper solution (than internal)

Easy ordering process

Better turn times

MS provides more confidence in execution

MS is faster than competitor or internal

MS expertise and skill base

MS uses your local appraisers

MS provides training and review of their panel of appraisers

Onboarding should happen asap

Help in appraiser set-up

Nudging them to get first 5 orders (submitted)

Guidance on getting appraiser panel right

Platform user training/panel

Written/recorded training??

MS is easy to use

Actual cost of using MS (calculator?)

Convenience of doing all appraisal business in one place

Advantages of using MS appraiser rights (vs for review only customers)

Why MS is better than local AMC

MS has done what they promised me

MS is aligned with my community bank/CA

MS improved my business

What's the status of my order?

Customer referrals

Exacts moving funds and taking MS with them

Customers Promoting MS on industry dashboards

Customers Promoting MS through Social Media comments

**DOING**

Going about everyday business

May be Researching AMCs

Recruiting for internal reviews / procurements

Browsing industry publications & info

Researching AMCs

Considering best approach for outsourcing process

Figuring out what to do about existing Appraisers

Figuring out how to scale their business

Had bad regulatory audit or exam

Nothing demonstrated in CRM Fundamentals

Researching AMCs

Researching ways to save money

Researching better ways to handle appraisal process

Talking to Credit/working in bank

Learn committee discussions

Calling references

Talking to appraiser panel

Talking to AP about their payment process

Moving to MS from in-house

Moving to MS from AMC

Moving part of AMC or in-house business

Confirming user acceptance

Learning order process

Onboarding

Using MS services

Confirming user adoption

MS 5 appraiser orders with help from CR Coach

Using MS services

Personal relationship with Customer Success

Monitoring what other services MS provides

Using MS services

Sharing MS benefits