



## Blue Sage Solutions for Credit Unions

**YOUR MEMBERS WILL LOVE THE EXPERIENCE.  
YOUR TEAM WILL LOVE THE TECH.**

**Highest in  
the industry**

**88**

**SYSTEM USABILITY  
SCALE (SUS) SCORE**

“Blue Sage has become a crucial point of differentiation for us. It delivers a superior experience and sets us apart in the market. LOs like its intuitive interface, and members enjoy the smooth process. Blue Sage gives us a competitive edge delivering the digital mortgage experience.”

**ROB DERRICKSON**  
MANAGER OF REAL ESTATE ORIGINATION  
SERVICE CREDIT UNION

### Stay innovative, productive and profitable

Our unified point of sale and mortgage origination platform is comprehensively built – not bolted together – so your credit union can better support members and achieve peak efficiency across the board.

### Give members an experience they won't wait to use

Rated excellent by independent testers, the Blue Sage platform's consumer direct tools received a System Usability Scale (SUS) score 30% higher than other industry platforms. Finally offer members a proven, modern and intuitive experience that features:

- Full functionality on any phone, device or web browser
- Automated income and asset verification
- Personalized and branded experiences
- Ability to lock rates, upload docs, eSign and check loan status
- Step-by-step support for short and long applications
- Multilingual support
- Individualized product searches and rate/fees quotes + side-by-side comparisons
- Automated notifications
- Ability to pay online for any fee

Initial disclosures

**12**  
MINUTES

WITH THE BLUE SAGE PLATFORM

HELOC approvals

**30**  
MINUTES

BY CURRENT BLUE SAGE PLATFORM CUSTOMER



**SEE WHY WE DEAL  
IN TRUE MORTGAGE  
INNOVATION  
NOT FALSE PROMISES**

## Increase production and potential for every channel, every loan and everybody

Completely browser based, the API-driven Blue Sage platform injects new levels of speed, visibility, security and possibilities into your mortgage operations.

### FAST TRACK ORIGINATIONS

- Automation for retail, wholesale, correspondent and HELOCs
- Zero rekeying of data anywhere
- Seamless two-way integrations with third-party services
- Configurable decisioning scorecards
- Complete audit trails and loan histories
- Closing, funding and post-closing support

### EMPOWER LOAN OFFICERS

- Mobile-enabled applications for better accessibility
- Cross-LO and LOA access capabilities
- Optimized sales portals including lead source, lead type, and referral dashboards
- Built-in contact management
- Pipeline management and advanced loan search
- Loan scenarios with detailed pricing and fee worksheets
- Performance metrics, pre-approvals, quotes

### ENSURE SECURITY AND COMPLIANCE

- SOC compliant
- Advanced encryption
- Member and loan data protected in transit and at rest

### GET UP AND RUNNING FAST

- Continuous support and training
- Ability to enter loans within six weeks via a test environment
- Opportunity for full implementation in 120 days



“We can add new features and capabilities for years without constantly building new bridges to third-party software and services. Blue Sage is completely superior to anything else on the market.”

**JERRY REED**  
PRESIDENT & CEO  
MEMBER FIRST MORTGAGE

TRUSTED BY YOUR PEERS FOR OVER 10 YEARS



### CONTACT

[sales@bluesageusa.com](mailto:sales@bluesageusa.com)  
[bluesageusa.com](http://bluesageusa.com)  
866.277.4582