

Loan Originations Dashboard



Perceptive**Analytics**

cs@perceptive-analytics.com

+1 (646) 583 0001

perceptive-analytics.com



COMPANY OVERVIEW



A Private Lending
Company



\$750M+
Loans

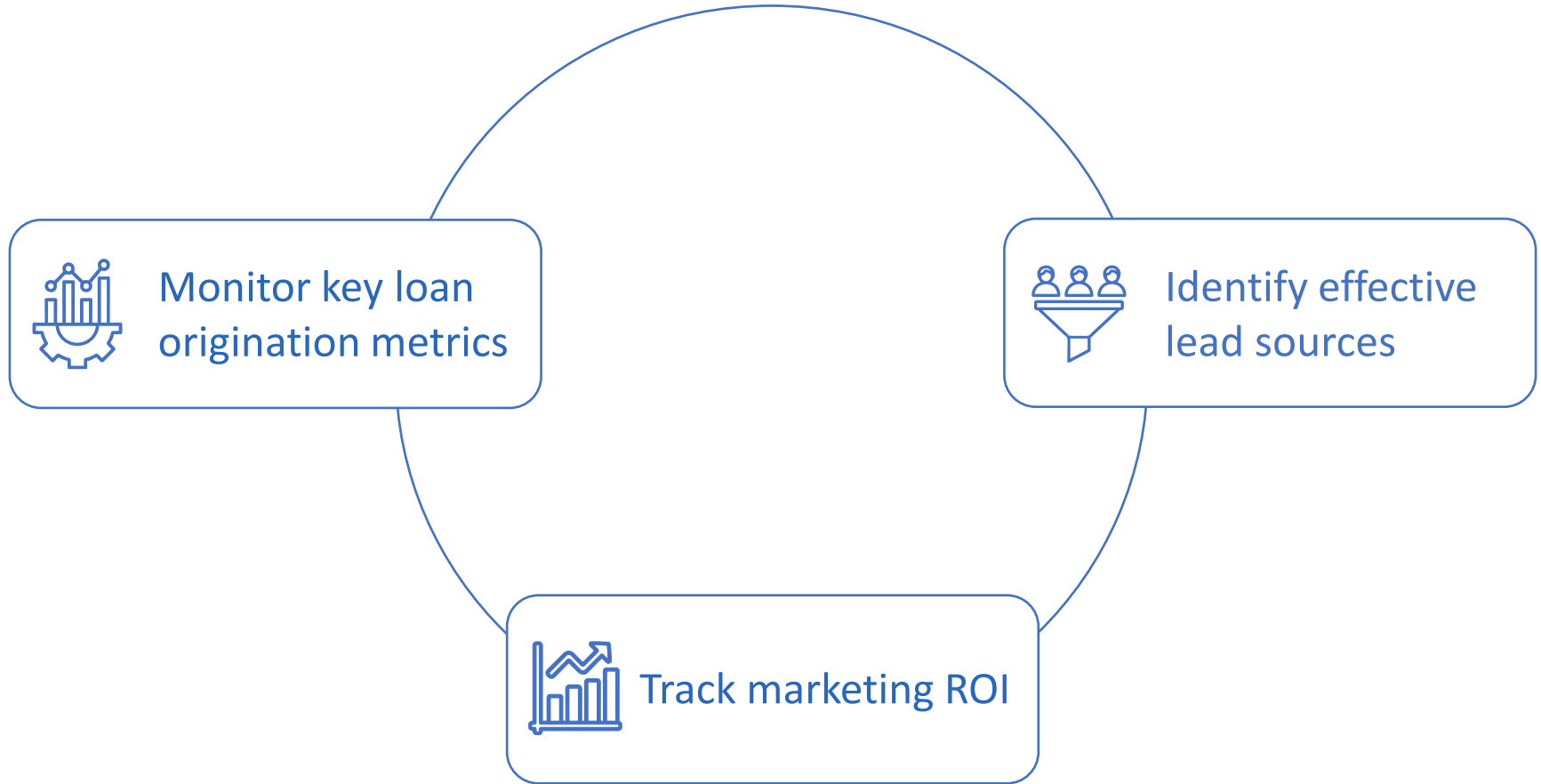


50
Employees

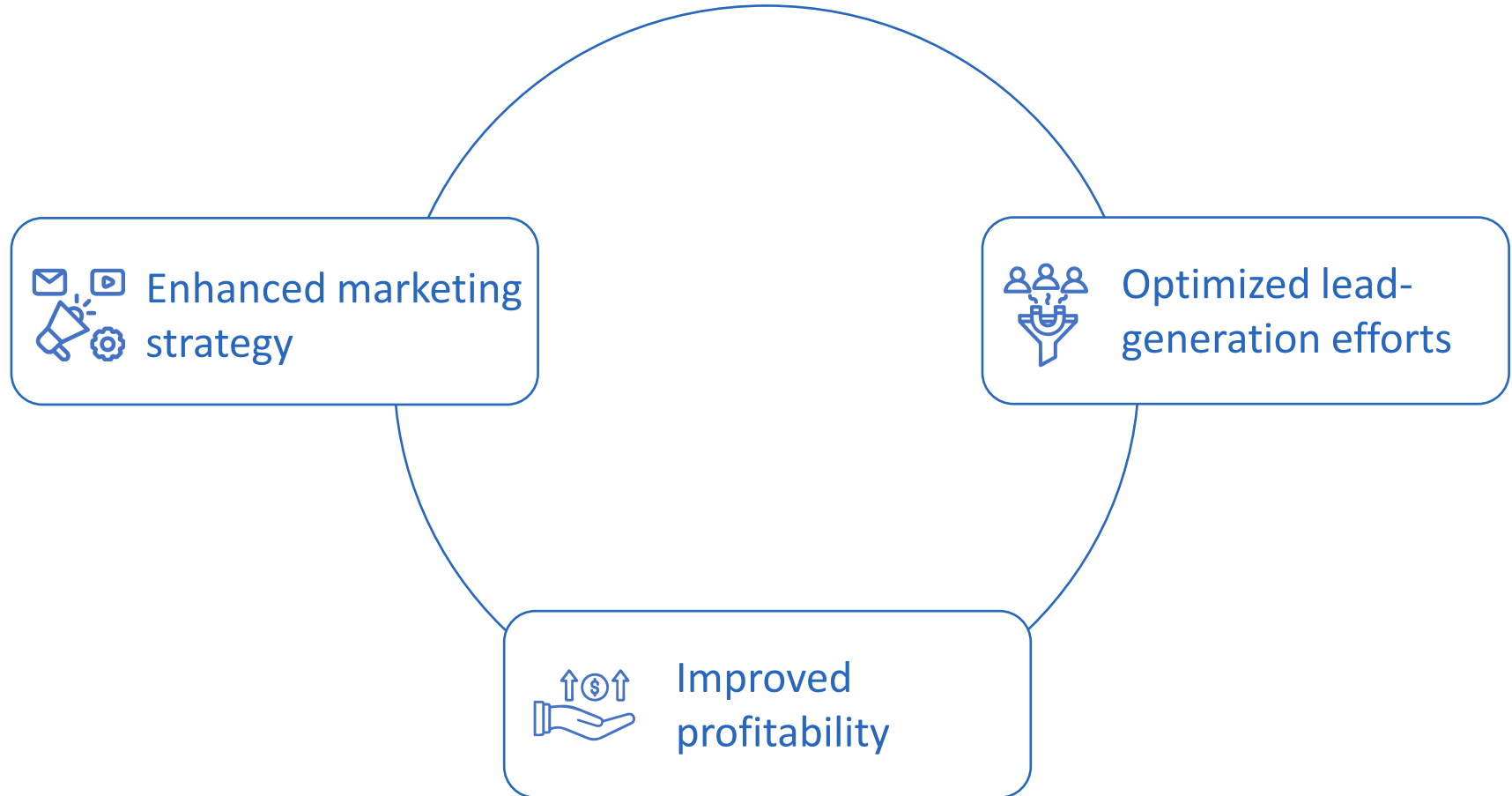


C-Suite Executives
(COO/CTO)

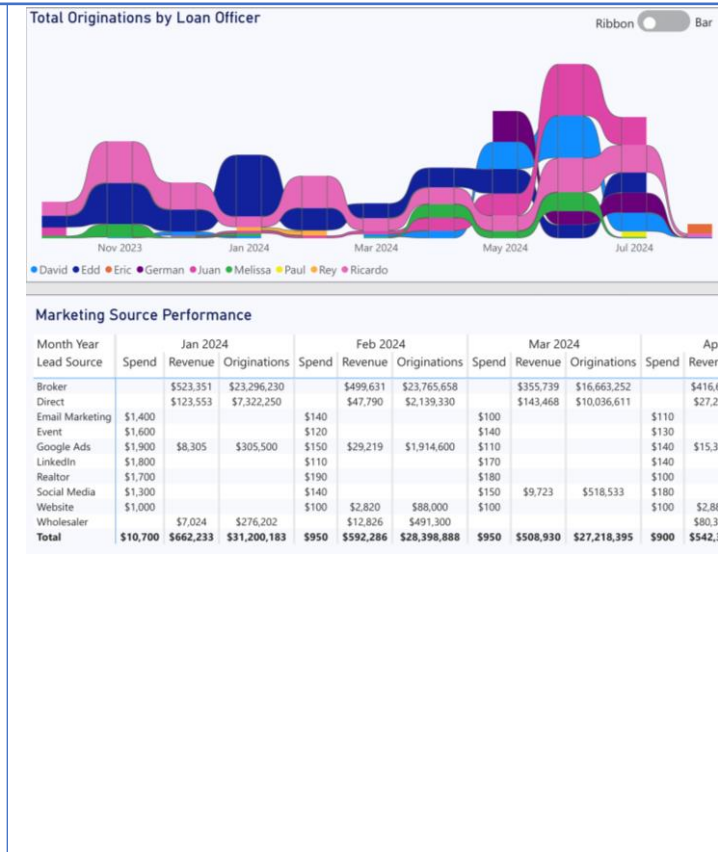
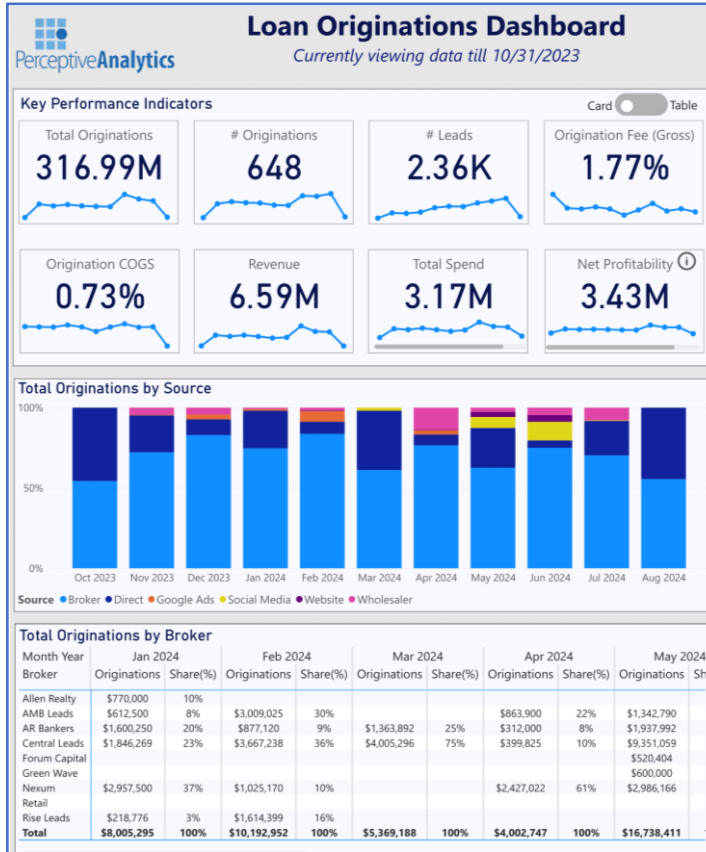
OBJECTIVES



BENEFITS

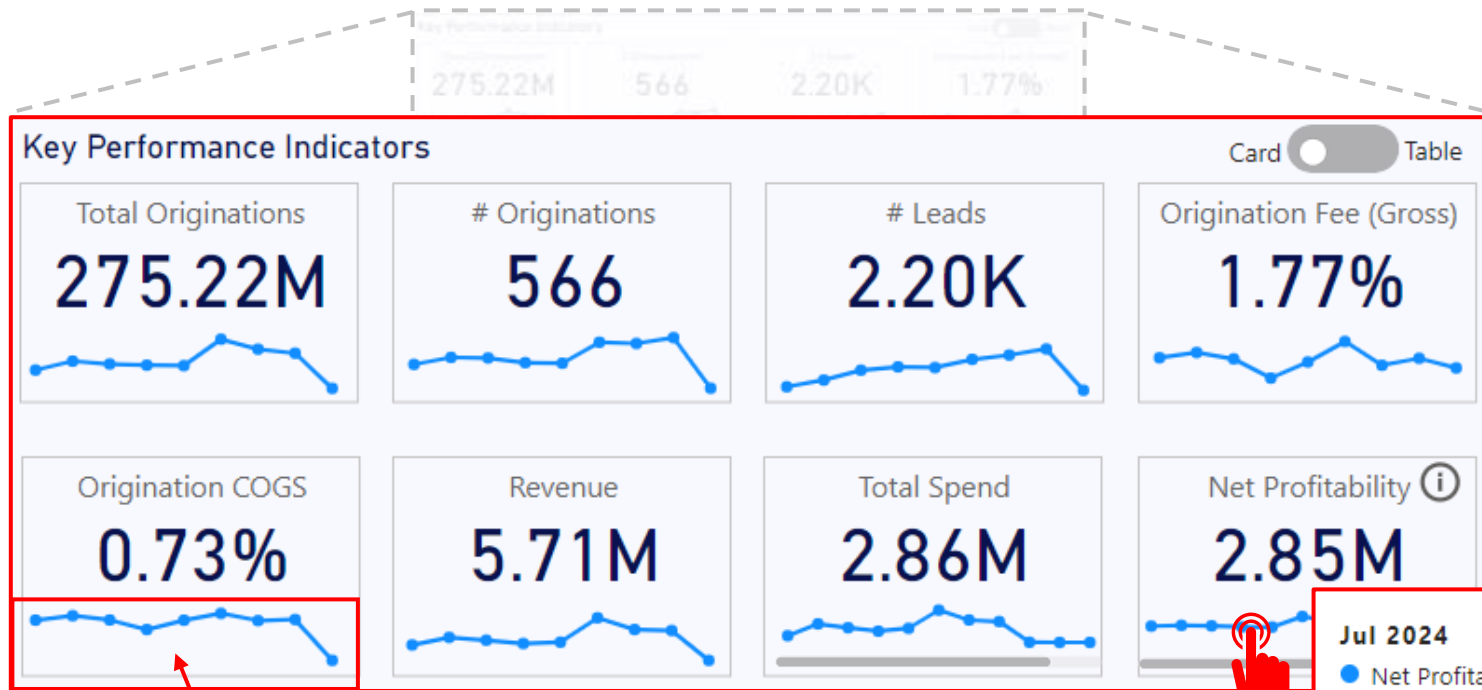


This is an overview



Let's look at the features >>

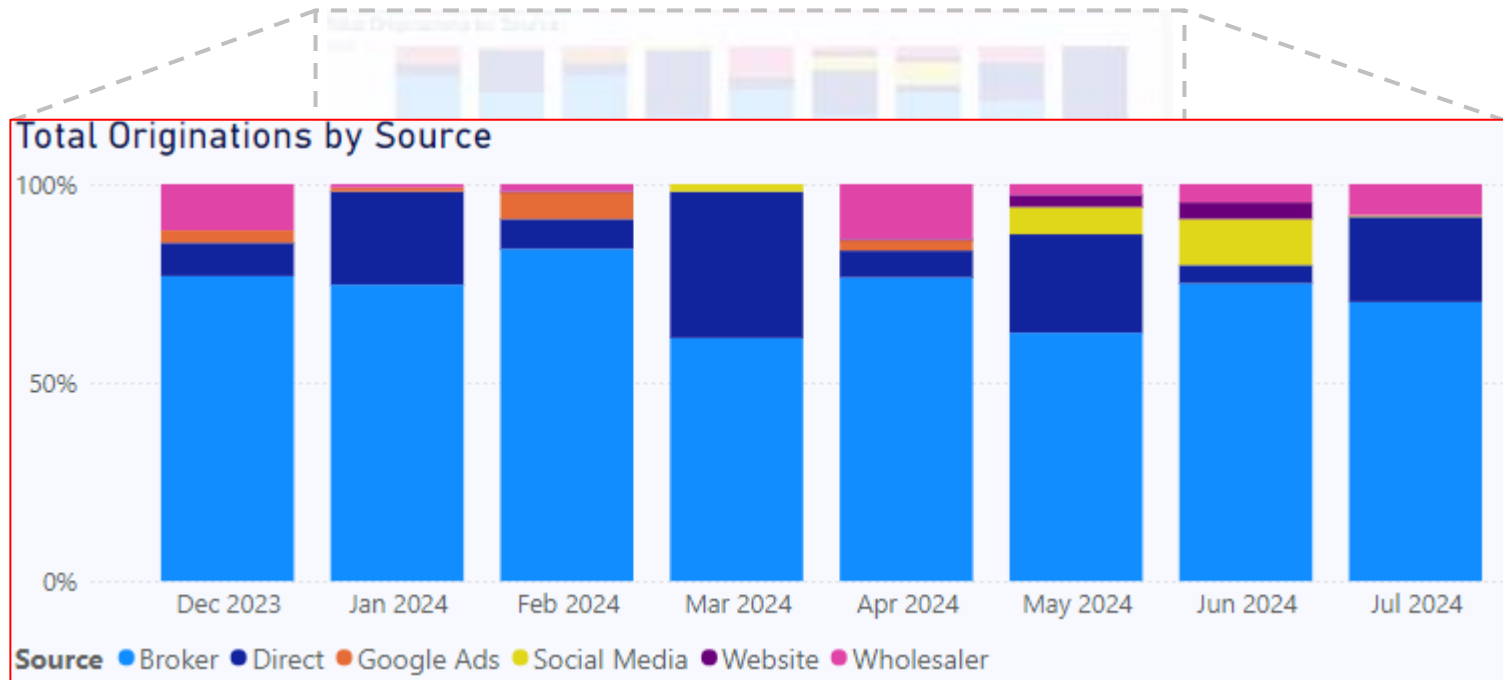
Monitor all key metrics and trends in one place



Check the past 12-month trend

Click on the trendline to see the value for that specific month

Analyze the originations from each lead source



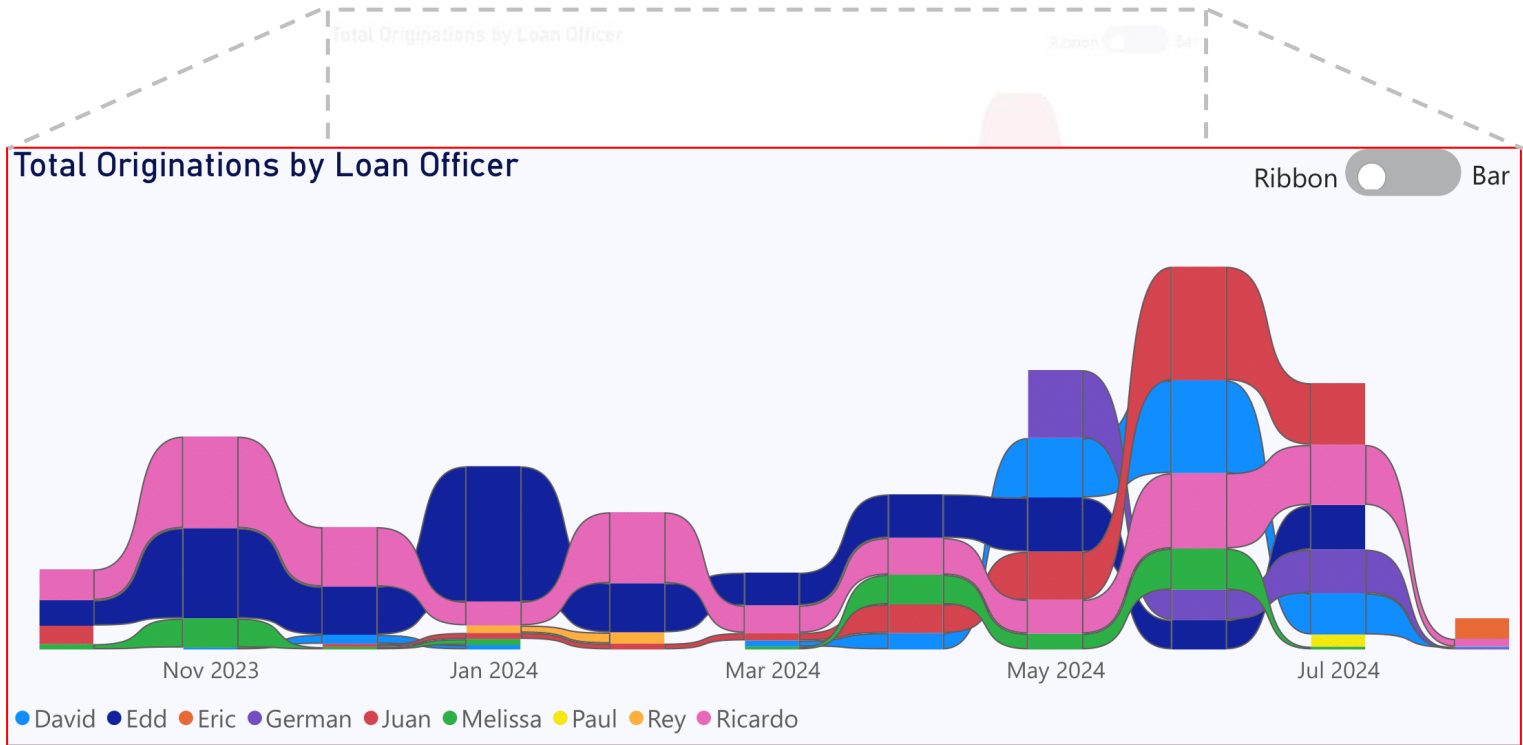
Assess the monthly share of originations by broker

Month Year	Jan 2024		Feb 2024		Mar 2024		Apr 2024	
Broker	Originations	Share(%)	Originations	Share(%)	Originations	Share(%)	Originations	Share(%)
Allen Realty	\$770,000	10%						
AMB Leads	\$612,500	8%	\$3,009,025	30%			\$863,900	22%
AR Bankers	\$1,600,250	20%	\$877,120	9%	\$1,363,892	25%	\$312,000	8%
Central Leads	\$1,846,269	23%	\$3,667,238	36%	\$4,005,296	75%	\$399,825	10%
Forum Capital								
Green Wave								
Nexum	\$2,957,500	37%	\$1,025,170	10%			\$2,427,022	61%
Retail								
Rise Leads	\$218,776	3%	\$1,614,399	16%				
Total	\$8,005,295	100%	\$10,192,952	100%	\$5,369,188	100%	\$4,002,747	100%

Total Originations by Broker

Month Year	Jan 2024		Feb 2024		Mar 2024		Apr 2024	
Broker	Originations	Share(%)	Originations	Share(%)	Originations	Share(%)	Originations	Share(%)
Allen Realty	\$770,000	10%						
AMB Leads	\$612,500	8%	\$3,009,025	30%			\$863,900	22%
AR Bankers	\$1,600,250	20%	\$877,120	9%	\$1,363,892	25%	\$312,000	8%
Central Leads	\$1,846,269	23%	\$3,667,238	36%	\$4,005,296	75%	\$399,825	10%
Forum Capital								
Green Wave								
Nexum	\$2,957,500	37%	\$1,025,170	10%			\$2,427,022	61%
Retail								
Rise Leads	\$218,776	3%	\$1,614,399	16%				
Total	\$8,005,295	100%	\$10,192,952	100%	\$5,369,188	100%	\$4,002,747	100%

Analyze originations by loan officer

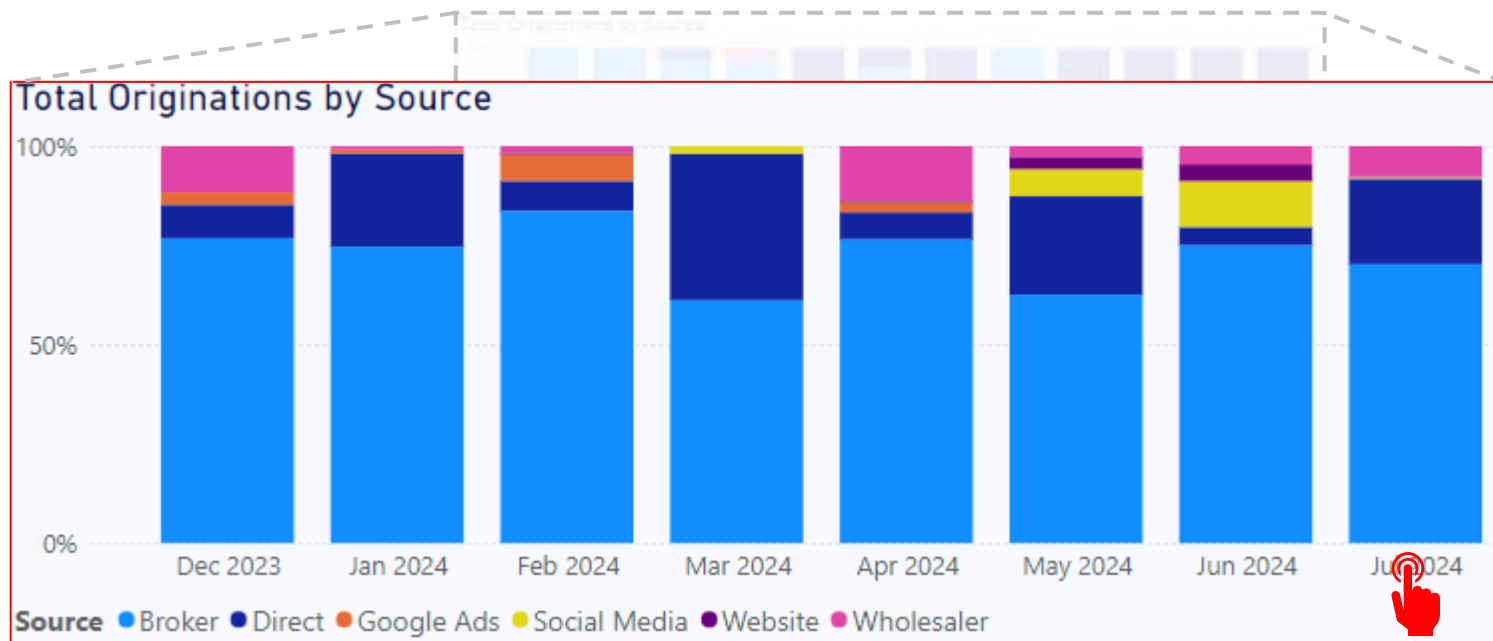


Analyze the monthly marketing spend vs revenue across lead sources

Marketing Source Performance									
Month Year	Jan 2024			Feb 2024			Mar 2024		
Lead Source	Spend	Revenue	Originations	Spend	Revenue	Originations	Spend	Revenue	Originations
Broker		\$523,351	\$23,296,230		\$499,631	\$23,765,658		\$355,739	\$16,663,252
Direct		\$123,553	\$7,322,250		\$47,790	\$2,139,330		\$143,468	\$10,036,611
Email Marketing	\$1,400			\$140			\$100		
Event	\$1,600			\$120			\$140		
Google Ads	\$1,900	\$8,305	\$305,500	\$150	\$29,219	\$1,914,600	\$110		
LinkedIn	\$1,800			\$110			\$170		
Realtor	\$1,700			\$190			\$180		
Social Media	\$1,300			\$140			\$150	\$9,723	\$518,533
Website	\$1,000			\$100	\$2,820	\$88,000	\$100		
Wholesaler		\$7,024	\$276,202		\$12,826	\$491,300			
Total	\$10,700	\$662,233	\$31,200,183	\$950	\$592,286	\$28,398,888	\$950	\$508,930	\$27,218,395

Now let's analyze deeper

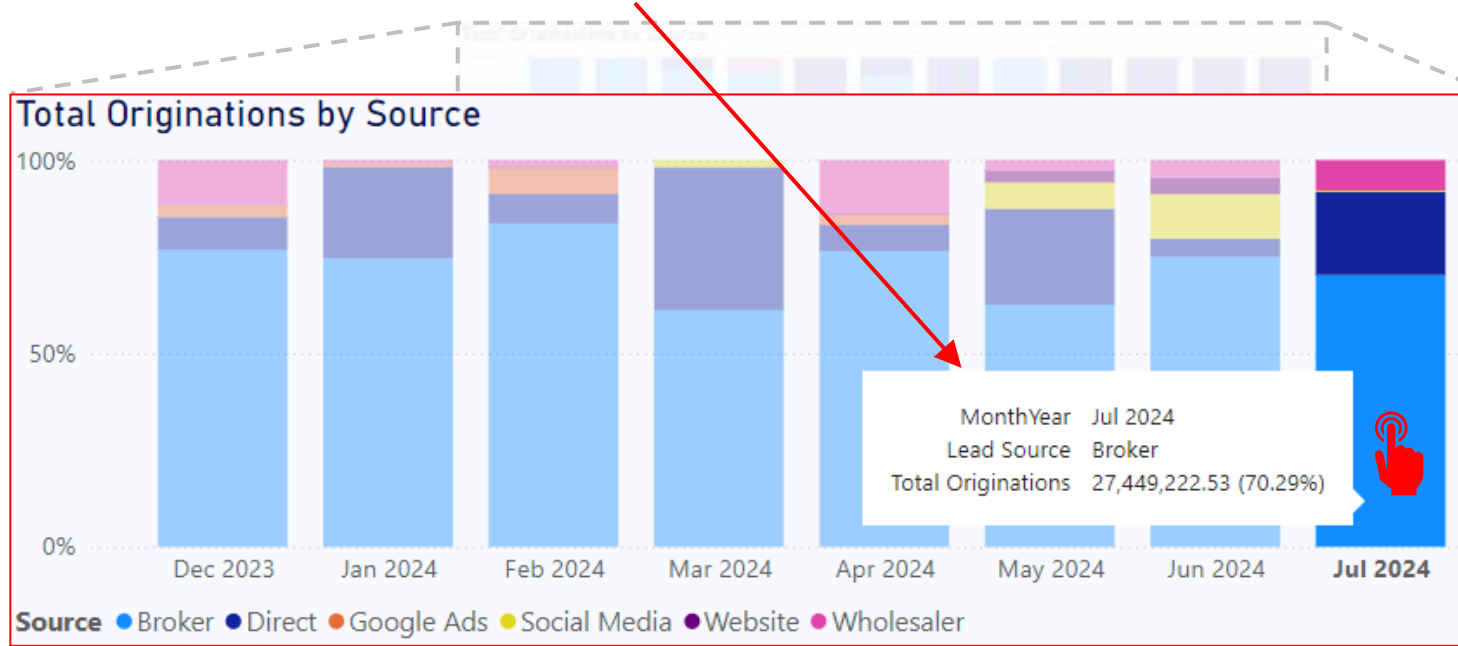
Analyze the originations for the month of July



Click on 'Jul 2024'

Let's look at more details >>

Hover over the bar to see the total originations for each source



Let's analyse the filtered details >>

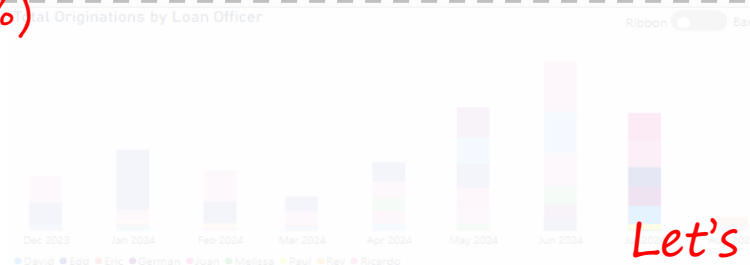


Total Originations by Broker

Month Year	Jul 2024		Total	
Broker	Originations	Share(%)	Originations	Share(%)
AMB Leads	\$396,660	1%	\$396,660	1%
Retail	\$19,723,068	72%	\$19,723,068	72%
Rise Leads	\$7,329,495	27%	\$7,329,495	27%
Total	\$27,449,223	100%	\$27,449,223	100%

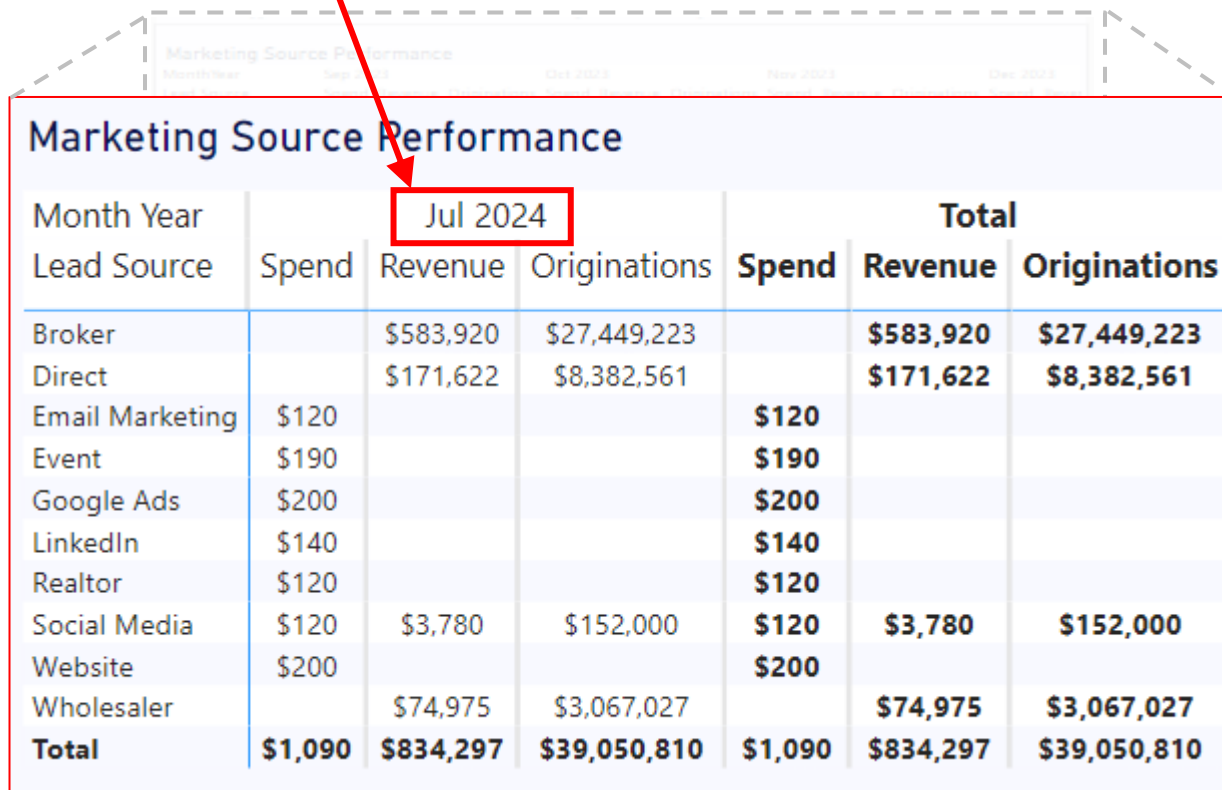
Month Year	Jul 2024		Total	
Broker	Originations	Share(%)	Originations	Share(%)
AMB Leads	\$396,660	1%	\$396,660	1%
Retail	\$19,723,068	72%	\$19,723,068	72%
Rise Leads	\$7,329,495	27%	\$7,329,495	27%
Total	\$27,449,223	100%	\$27,449,223	100%

This highlights the brokers who drove originations, along with their respective share (%)



Let's break down further >>

July month spend vs revenue data gets filtered out



The image shows a screenshot of a 'Marketing Source Performance' report. A red arrow points from the text above to the 'Jul 2024' column header in the table. The table has columns for 'Month Year', 'Lead Source', 'Spend', 'Revenue', 'Originations', and 'Total' (with sub-columns for Spend, Revenue, and Originations). The data is presented in a grid format with alternating light blue and white rows.

Marketing Source Performance						
Month Year	Jul 2024			Total		
Lead Source	Spend	Revenue	Originations	Spend	Revenue	Originations
Broker		\$583,920	\$27,449,223		\$583,920	\$27,449,223
Direct		\$171,622	\$8,382,561		\$171,622	\$8,382,561
Email Marketing	\$120			\$120		
Event	\$190			\$190		
Google Ads	\$200			\$200		
LinkedIn	\$140			\$140		
Realtor	\$120			\$120		
Social Media	\$120	\$3,780	\$152,000	\$120	\$3,780	\$152,000
Website	\$200			\$200		
Wholesaler		\$74,975	\$3,067,027		\$74,975	\$3,067,027
Total	\$1,090	\$834,297	\$39,050,810	\$1,090	\$834,297	\$39,050,810

Let's break down further >>

'Social Media' is the only paid channel that generated revenue

Marketing Source Performance						
Month Year	Jul 2024			Total		
Lead Source	Spend	Revenue	Originations	Spend	Revenue	Originations
Broker		\$583,920	\$27,449,223		\$583,920	\$27,449,223
Direct		\$171,622	\$8,382,561		\$171,622	\$8,382,561
Email Marketing	\$120			\$120		
Event	\$190			\$190		
Google Ads	\$200			\$200		
LinkedIn	\$140			\$140		
Realtor	\$120			\$120		
Social Media	\$120	\$3,780	\$152,000	\$120	\$3,780	\$152,000
Website	\$200			\$200		
Wholesaler		\$74,975	\$3,067,027		\$74,975	\$3,067,027
Total	\$1,090	\$834,297	\$39,050,810	\$1,090	\$834,297	\$39,050,810

Take action:

- Reallocate the budget to high-performers*
- Improve targeting efforts*



PerceptiveAnalytics

End-to-End Data Analytics Services

Winner

Fidelity Investments
Data Challenge

100+

Clients Served
Across Industries

15+

Years of
Experience

Schedule a free consultation



cs@perceptive-analytics.com

+1 (646) 583 0001

perceptive-analytics.com

[CLICK HERE TO SCHEDULE](#)