

# DataMax Marketing Systems (DMS)

## Welcome / Instructions Package

**C**ONGRATULATIONS! You are exploring the possibilities of a new career as a consultant in mortgage notes or alternative commercial finance. Many begin seeking new careers as a result of corporate downsizing, lack of advancement potential, or simply job loss due to outsourcing. To be certain, much of the security that was once a benefit of being a productive “team player” for large domestic corporations is a thing of the past.

More and more jobs are lost each and every day to outsourcing. In “New America”, even state sponsored service sector jobs are now dutifully handled by residents of India, Pakistan, and other areas of the Pacific Rim. Each year, more and more manufacturers find they must relocate production facilities to mainland China or face fierce and insurmountable competition from others that do. Even those companies that manage to remain competitive without relocation, do so only through downsizing, salary reductions, and employee benefits elimination.

Whether you are acting reactively as a result of already experiencing some or all of the above or proactively because you can clearly see that the handwriting is on the wall, you are at the very least, exploring the possibilities of a career move that will allow you to build a lucrative consulting business, enjoy an upscale financially comfortable lifestyle, and take pride in a profession of prestige and distinction.

A career as a consultant / broker in the paper industry can provide a virtually unparalleled standard of living for those equipped for the task and driven by a need for success. Productive professionals will enjoy extraordinary income potential, inherent job security, and the exceptional freedom and flexibility that comes with being your own boss. As an industry consultant, the services you offer are constantly in demand by individuals, small business owners, and large corporations alike.



### **IMPORTANT WEBSITE AREAS & DMS LINKS**

[Build Your New Website  
and CFI Member Support](http://www.datamaxmarketingsystems.com/cfi.htm)  
[www.datamaxmarketingsystems.com/cfi.htm](http://www.datamaxmarketingsystems.com/cfi.htm)

[IACFB / CFI Member Support](http://www.iacfb.org/cfi.htm)  
[www.iacfb.org/cfi.htm](http://www.iacfb.org/cfi.htm)

[Subscribe to IACFB Newsletter](http://www.iacfb.org)  
[www.iacfb.org](http://www.iacfb.org)

[View the IACFB Forum](http://www.iacfb.org/forum)  
[www.iacfb.org/forum](http://www.iacfb.org/forum)

[FactorMax Guerrilla](http://www.factormaxbds.com)  
[www.factormaxbds.com](http://www.factormaxbds.com)

# DataMax Marketing Systems (DMS)

## Web Site Build Instructions & Information (CFI)



*Congratulations on the purchase of your new financial consultant's website. The following are some IMPORTANT instructions and helpful suggestions regarding initial web site setup.*

1. To have DMS complete your site, you must provide us with the information on the CFI Web-Order form at [www.datamaxmarketingsystems.com/cfi.htm](http://www.datamaxmarketingsystems.com/cfi.htm). This is the "Sponsors Private Page" at DMS that will include links to helpful information as you begin your note or cash flow business.

For CFI members, DMS offers a choice of five (5) sites.

- a cash flow "Flex Master Broker" web site which features information on eight different areas of the cash flow industry.
  - four (4) additional sites for those that want to focus their efforts only in the traditional residential mortgage notes / business notes / structured settlements / area.
2. To begin the order process, from the top of the form, select the code number of site you are requesting. The selection defaults to 09CF-03 which is the "Flex Master Broker" site featured in all CFI promotions. You may always view a sample of it and other offered sites by double-clicking the blue links. If you select a site other than the default site, click on the small circle (radio button) next to your selection on the form.
  3. The business information, (name, address, phone, email, etc.) will appear on your site as entered in the form. Our computers are responsible for the input of your information. If you make a mistake in spelling of your business name or address, it will appear exactly as you have spelled it including the error. Be specific about what you want to appear on your site. Also, be selective regarding your business name. You are involved or becoming involved in a very prestigious area of the financial community. Becoming a broker in any area of alternative commercial finance is a relatively professional area of endeavor.
  4. Your URL is your address on the internet. It will begin with (www.) and be followed by (.com or .org or .biz, etc). We strongly recommend .com as it is by far the most widely used and easiest to remember by a prospect or customer. Your URL does not have to be the same as your business name but it should include elements of the business name to help your prospects and customer remember it. For example, a business name such as American First Capital Note Buyers, Inc. can be shortened to [www.amfirstcapnotes.com](http://www.amfirstcapnotes.com). In general, the shorter your URL, the better and easier for prospects and clients to remember. When marketing, you will also be placing classified ads. Be sure your URL fits within a standard column for classified advertising. Check for URL availability from [www.checkdomain.com](http://www.checkdomain.com) but DO NOT PURCHASE THE DOMAIN. We supply it FREE.

5. DMS will register an additional business email specific to your site for \$25. An example would be info@kansasnotebuyer.com or could also include a name such as smith@kansasnotebuyer.com. Such additional emails will be "pointed" to your normal email address that you are currently using. This means that completed forms or questions asked by your prospects or customers will be found at your regular email address provided by your current email provider such as America Online, Yahoo, Google, etc.
6. Generally, your site will be completed within 24 hours of our receipt of your completed CFI-WebOrder form. When initially completed, there will be an "introduction" page that you will first view when visiting your site. This "introduction" page will be removed when DMS has received your completed Web Site Hosting Agreement. The **Web Site Hosting Agreement** can be downloaded from the CFI Sponsors page at [www.datamaxmarketingsystems.com/cfi.htm](http://www.datamaxmarketingsystems.com/cfi.htm).
7. When visiting your site for the first time, make certain you do not search for the site in Google, AOL Search, or Explorer Search. This is a common mistake and we receive many inquiries each month by new brokers. You must type your site address including (www.) into an address bar, not a search bar. Search engines such as **Google** and directories such as **Yahoo** may not reference your site for several months. You can speed up the process of the visit or request inclusion in a directory by going to the Search Engine or Directory and submitting your site.
8. The associated fee for hosting and web site support through DMS is \$15 per month. Your initial charge will be \$45 for setup and your first three months hosting. Your credit card will be charged \$15 per month thereafter. If you change your business address, phone number, etc., we will quickly modify this information on your site free of charge. We will also add a logo and memberships to organizations such as the Better Business Bureau, Chamber of Commerce, etc. without charge. To make a change, send us an email from the technical support area at [www.datamaxmarketingsystems.com/techsupport.htm](http://www.datamaxmarketingsystems.com/techsupport.htm)

When you site is activated, make certain your check the business information on the site for correctness. Send yourself a test email from your site and make certain the pointers have been set correctly so the mail is forwarded to your regular email. Your site will include multiple form fields so that prospects can request quotes or additional information on your services. It is a good idea to check the forms periodically and always check the forms for proper function prior and during marketing campaigns such as direct mail, cold calling, etc.
9. The primary value of your consultant's website is to provide your prospects and those you network with an easily accessed source of information on you and your services. Make certain you include the URL address on your business cards, letterhead, brochures, and any other marketing materials.
10. To request any change in address or if you have any questions regarding its operation, please submit an email to support@datamaxmarketingsystems.com and we will respond promptly.

## QUESTIONS AND ANSWERS

**Q. Am I contractually obligated to maintain my site for a year or more?**

A. No. For CFI members, our hosting is based on an "open" contract. You may terminate your site at any time without penalty. Monthly fees already processed, however, are non-refundable.

**Q. How can I tell when my site is up?**

A. In addition to simply entering your new domain in the address bar of your browser and simply checking, you will also receive an e-mail from our technical department that your new site is available for viewing.

**Q. How do I pay my Hosting & Support fee?**

A. When you complete your Hosting Agreement, you will provide Datamax with your credit card information and your account will be initially charged \$45 for setup and your first three months hosting. Each month thereafter, your card will be charged \$15. We accept Visa, MasterCard, Discover, and American Express debit and credit cards.

**Q. What if my credit card does not clear on a given month?**

A. Our system is set up to attempt to clear your card 3 times on consecutive days. If it fails after 3 attempts, you will be contacted by email or by support. Make certain you set any SPAM filters you are using to accept e-mail from our notification e-mail address at [support@datamaxmarketingsystems.com](mailto:support@datamaxmarketingsystems.com).

**Q. What if I let my site lapse for 30 days or longer without payment?**

A. Generally, we will re-direct the domain to DataMax. In the event that the lapse occurs on the anniversary of your domain (your domain expires), we will not renew your domain. Be aware that if your domain expires, it can be costly to retrieve it after 30 days.

**Q. What if I want to add some additional product areas to my site?**

A. The Flex Master Broker site is designed so that additional pages for new and exciting product areas can be quickly added. All career-minded brokers in paper are always on the lookout for new product opportunities. We can generally add one or two product areas for about \$100 per information page which may also include a form field page.

**Q. I have a booklet I would like to offer on my site. How can I do this?**

A. An important feature and we support it. If you send us a copy of your booklet in Adobe PDF format, we will create an "OFFER" link on any page which allows the prospective client or lead to download your booklet. This is free of charge and included in your monthly support and hosting fee. We do not build company stores, however, as these can be quite expensive.

**Q. I have another website. Will you create a link to it?**

A. Absolutely. Be aware though that the job of your marketing (direct mail, email, networking, etc.) is to get visitors to come to your website for additional information. Really, the last thing you want to do is to send visitors somewhere else.

**Q. Can I track the number of visitors to my website?**

A. Yes. For those that want to track visitors, Datamax provides a link to our tracking system. E-mail support for link info at [www.datamaxmarketingsystems.com/techsupport.htm](http://www.datamaxmarketingsystems.com/techsupport.htm)

**Q. How do I increase traffic to my site?**

A. Getting your site listed on the various search engines and directories will increase traffic to some extent. Bear in mind, however, your site is a virtual billboard of important information designed primarily to support your direct marketing and networking efforts. If you receive hits from random information seekers, they are likely just shopping for quotes or competitive bids. If they have found your site, they have also found dozens of others. Your commissions and fees will suffer.

**Q. What if I move or change my phone number?**

A. Simply send your new address of contact information to technical support and we will generally have your site updated within 24 hours.

**Q. Can I insert a photograph of myself?**

A. Absolutely. We recommend you insert it in your "Contact Page". No charge.

**Q. Does Datamax provide any marketing tips for its web site customers?**

A. DataMax is primarily involved in the "commercial" side of the industry and the lucrative areas of "Loan Brokering" in the factoring, asset-based lending, and alternative commercial finance industry. There are two well known newsletters published for note brokers which have excellent marketing tips in every issue. These are *The Paper Source* and *Noteworthy*. We recommend subscription to both.

**Q. Does DataMax publish a newsletter for brokers?**

A. Yes. Our newsletters primarily focus on the commercial side of the industry and you may "opt-in" from the IACFB web site at [www.iacfb.org](http://www.iacfb.org).

**Q. What is the IACFB?**

A. The IACFB is the **International Association of Commercial Finance Brokers** and supports brokers and intermediaries in the loan brokering, factoring and alternative commercial finance industry. IACFB members receive weekly continuing education in the form of *Lender Showcases*. As a CFI member, you are provided with a 90 day Guest Membership to the IACFB. Upon expiration, you are eligible for full membership for \$99 per year. It is important to note that in today's recessionary economy, factoring was recognized as a Top 10 Profession for 2009.

**Q. What is the IACFB FORUM?**

A. The forum is an interactive area where IACFB members can ask questions about specific products and converse with other IACFB brokers and lenders. It is the only such domestic forum on the internet and is based on its European counterpart.

**Q. How do I get my free 90-day *Guest Membership* to IACFB?**

A. Complete instructions on how to access your free 90-day membership are available at [www.iacfb.org/cfi.htm](http://www.iacfb.org/cfi.htm)

**Q. How long should it take me to succeed in the Industry?**

**A.** That greatly depends on how you work. We are constantly amazed at the number of individuals that set up their business and then drop out after just a few months. They do no marketing, no networking, do not promote their web site or business in any way, and are then surprised when business does not walk in the door. Whether you chose to focus on the cash flow side of the industry, the loan brokering side or both, this is a career...not a get rich quick scheme. Yahoo Hot Jobs just rated factoring as a **Top 10 Profession** for 2009. In today's economy, if you cannot succeed in a "Top 10 Profession", you need to sit down and review your personal work habits, goals and objectives. Give yourself plenty of time to succeed in the industry, however. At least one year. This is a career, not an "overnight, get rich quick scheme".

**Q. What is the difference in Cash Flow Brokering and Loan Brokering?**

**A.** The **Cash Flow Industry** revolves around *Discount Mortgage Notes*. Its most important additional components and product areas will include:

- Discount Business Notes
- Structured Settlements, Annuities, and Lotteries
- Mobile Home Paper
- Inheritance Advances
- Senior Settlements
- Pre-Lawsuit Advances
- Other unique cash flows generally involving "Consumers".

While most cash flow brokers initially focus on brokering, the ultimate goal in the industry is to invest in paper due to the relatively high yields available. Commissions for placing paper tend to be substantial and on a "one time" basis.

The **Loan Brokering Industry** revolves around *Factoring*. Its most important additional components and product areas will include:

- Asset-Based Lending
- Purchase Order Finance
- Merchant Cash Advances
- Export Trade Finance
- Equipment Leasing
- Venture Capital
- Other loan products generally involving "Business Owners".

Virtually all loan brokers (CFCs) simply broker and seldom invest in the actual paper. Several areas, such as factoring and purchase order finance feature **residual commissions paid for the life of the account** to the referring broker monthly. This allows brokers to build "books" of business and to **receive monthly income often for years**.

**Q. Which is the best area to focus?**

**A.** Most new industry entrants tend to explore both sides of the industry. Both businesses can be operated from a home-based office. Loan brokering tends to be more of a suit and tie business whereas Cash Flow Consulting tends to be more casual.