

DAILY AI ACQUIRES WHITEBOARD CRM



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We're excited to meet you.

The Whiteboard CRM and the Daily AI team created this guide to help you navigate the acquisition news.

Take a look at the FAQs below. If you have any questions, don't hesitate to reach out to a specialist.

You can sign up to [book time on the calendar](#).

What is Daily AI?

Daily AI provides intelligent solutions for mortgage lenders. Our all-in-one platform enables mortgage loan officers, origination teams, and mortgage enterprises to grow their businesses through automation.

The Daily AI CRM automates lead conversion, in-process transaction management, and post-close nurture campaigns.

Additionally, Daily AI provides drip campaign technology milestones that integrate with your LOS, enabling mortgage professionals to streamline operations and increase ROI.

Why did Daily AI acquire Whiteboard CRM?

Whiteboard CRM has a long history of supporting mortgage professionals with its CRM platform. Its origins in lender coaching and stellar customer support are aligned with Daily AI's values.

Daily AI's mission is to help mortgage professionals increase their performance with help from our solutions.

Our combined teams will help to further this mission by increasing our ability to provide world-class products, client service, and value.

How does this acquisition impact Whiteboard CRM customers?

At this time, there is no immediate impact to Whiteboard CRM customers.

This acquisition opens up the opportunity for Whiteboard CRM customers to get to know Daily AI. There are many features available through Daily AI that you don't have access to with Whiteboard CRM, including:

- Large team accounts
- Partner landing pages
- Expanded outreach capabilities, such as video texting and ringless voicemail drops

Book time with the team if you're interested in exploring Daily AI.

[BOOK TIME](#)



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Do I have access to Daily AI now?

At this time, Whiteboard customer contracts will be honored through conclusion. You do not have access to Daily AI unless you transition your contract.

If you wish to receive a personalized Daily AI demo, please [contact us](#).

If you would like to transition your Whiteboard contract to join Daily AI, please [let us know](#).

Will Whiteboard CRM be sunsetted for users?

At this time we do not have plans to sunset the Whiteboard CRM product.

Will there be a change in my Client Success team?

You will most likely continue to work with the same Client Success Specialist. We will contact you if anything changes, but for now it's business as usual.

My Whiteboard contract is up for renewal soon. Who should I contact?

Please contact us here if your Whiteboard contract is up for renewal in the next 3 months. If you're interested in transitioning to Daily AI sooner, [let's book time](#) to discuss your options.

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