

## LSI MORTGAGE STRIKES REMARKETING GOLD

Sky-high ROI attributed to Velocify's automated distribution



### INDUSTRY

- Mortgage

### COMPANY PROFILE

- 140 employees
- Headquarter in Atlanta, GA
- Licensed to conduct business in 37 states

### CHALLENGES

- Unable to automate distribution of leads to available loan officers
- Needed an integrated system with reporting and analytics for tracking sales team performance from lead to closed loan

### SOLUTION

- Director of Marketing, Brigitte Marshall, turned to Velocify for a more efficient way to distribute leads, monitor sales performance, and re-market to older leads, resulting in significantly higher revenue

### BENEFITS

- Intelligent lead distribution to accelerate lead response and close more loans
- Maximized daily productivity for loan officers.
- Identification of re-marketing opportunities to older leads resulting in significant increases in additional revenue
- Integration with Encompass Loan Origination System to provide greater visibility into lead to loan close lifecycle



### BUSINESS CHALLENGE

LSI Mortgage Plus needed a system to automate the distribution of sales leads to loan officers and required greater visibility into their sales teams' daily performance. They were unable to track whether or not loan officers were following up effectively with leads that the bank purchased. In addition, LSI Mortgage needed to move away from their manual-based process of distributing leads by the Director of Marketing, Brigitte Marshall.

On her first day on the job, Marshall's boss showed her how to distribute leads by sending an e-mail to about 70 loan officers if they wanted to be "on" for their rotation. After being bombarded with emails all day from loan officers saying "turn me on for leads," or "turn me off for leads," she knew there had to be a better way.

### SOLUTION

LSI Mortgage was in need of a solution to automatically manage the distribution of new and inactive leads to loan officers based on business rules and the availability of loan officers. They also needed a solution that would allow them to analyze the lead data for greater insights into what was working and what wasn't to make adjustments in their sales processes and improve performance. Marshall chose to implement Velocify LeadManager™ since she had experience using the system at another mortgage company as a more efficient way to distribute leads, monitor sales performance, and re-market to older leads.

“We’ve increased the ROI on many of our lead sources by identifying leads that had less follow-up and remarketing to them.”

Brigitte Marshall, Director of Marketing,  
LSI Mortgage Plus

## BENEFITS

With Velocify, Marshall is finally free to focus on value-added marketing responsibilities. The largest benefit to LSI Mortgage, however, has been Velocify’s proprietary, automated lead distribution, allowing loan officers to work a blend of new and old leads more efficiently.

Before using LeadManager, Marshall didn’t have the ability to easily check on the status of a lead to ensure it was progressing toward a loan or had even been called. Now Marshall has set up distribution programs to quickly move inactive leads away from users and into what the company calls the “shark tank” for other loan officers to work when they have extra time.

LSI Mortgage Plus has also benefited from integrating the robust reporting and analytic capabilities with Encompass, the company’s Loan Origination Software (LOS). With Velocify, loan officers have improved the velocity at which they can respond to leads and close loans.

## REMARKETING OLD LEADS DRIVES INCREASED REVENUE

LSI Mortgage Plus is using LeadManager to ensure all new leads receive immediate, frequent and thorough follow-up, which is the first rule they apply to new leads. But where they have really struck gold is by leveraging best practices from Velocify to ensure the right level of follow-up with old leads and by identifying leads that have never been contacted at all.

## REPORTING AND ANALYSIS PROVIDES GREATER INSIGHTS

The reporting capabilities in the company’s previous lead distribution system were extremely limited. With LeadManager, LSI Mortgage is now able to mine their data for greater insights.

For example, with the help of LeadManager analytics and existing best practice benchmarks, LSI Mortgage gained new insight into their marketing programs and discovered that 53% of loans closed came from one source that was 60 to 120 days old.

“Knowing that old leads close well from this source allows us to be more aggressive about how we remarket to this source,” said Marshall.

What Marshall appreciates most about the analytic capabilities of Velocify is the ability to customize data to meet her reporting needs. LSI Mortgage has a master data set they continuously append that has lead data going back more than 18 months. Marshall can run custom reports based on any data to slice and analyze the performance of her sales and marketing efforts.

“Anytime there’s a need for any lead data in any format, with just a few clicks of my mouse, I can have it,” said Marshall. Encompass integration drives visibility into ROI of leads purchased. By leveraging LeadManager’s integration capabilities, LSI Mortgage Plus now has visibility into the entire cycle of the loan – from lead to funding process.

“We can now match the closing data in Encompass with the lead data in LeadManager, giving us the ability to calculate ROI by user, campaign and by the date we got the lead,” said Marshall. “This lets us know how well we’re doing with the new leads we’re buying and also how well we’re doing with leads that are 30, 60 and 90+ days old.”



## ABOUT LSI MORTGAGE PLUS

LSI Mortgage Plus is a national mortgage banker/broker with more than 140 employees. Their company philosophy is simple: focus on the customer. Their loan consultants will take time to understand your situation, wants and needs, and recommend the most suitable loan options.

[www.mortgage-plus.com/](http://www.mortgage-plus.com/)



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