

Marketing Automation Doubles Close Rates.

"SoftVu's personalized, automated communications are the most effective way we have to improve opportunities to close and offer a highly professional image to our online leads."

- Aaron Hill, SoftVu Client, CEO, Diversified Mortgage Services

The Situation

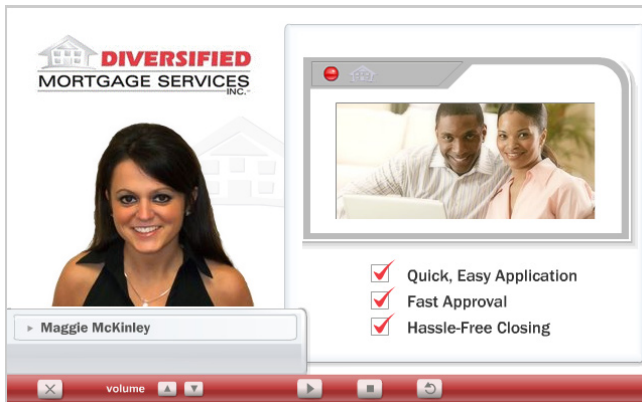
Online lending is rising due to recent demand by younger, technology-savvy customers. The loss of the personal touch offered by traditional "bricks and mortar" lending shops, however, is a common complaint. SoftVu LLC, a leader in marketing automation systems, helps businesses such as online mortgage companies close more sales through humanized messaging to bring back customer engagement to their sales force.

The Challenge

How do online lenders compete effectively? How do you build online relationships and reach qualified leads?

SoftVu client, Diversified Mortgage Services, sought

- An uncomplicated, high-touch approach to combat their lack of face-time with online customers.
- An automated solution to reach thousands of prospects in a compelling, memorable way.



The Solution

Using information sent from Diversified's lead origination system, SoftVu provided an integrated series of automated campaigns to help their sales force convert leads. Once the lead source provided loan offer details and assigned a loan officer, SoftVu's proprietary communications platform automatically built, managed, distributed, and tracked messages delivered to loan prospects. Follow-up communications were then sent at strategic points in the process to automate and foster lead incubation keeping Diversified in front of potential borrowers.

The Implementation

- Communications included under-a-minute videos from actual Diversified loan consultants emailed to prospects immediately after they completed a loan online.
- Loan consultants were automatically notified by email or cell phone text message the instant their prospect viewed their video message.

By harnessing web, email and mobile channels, and enhancing it with the warm, friendly human face of a lender, SoftVu extended Diversified's personal presence. Prospects became engaged fans. The lender was able to target hand-raisers and open dialogue with them.

Initial communications with prospects were complemented with lead nurturing and follow-up campaigns automatically delivered at strategic time periods to foster relationships and keep Diversified in front of potential borrowers.

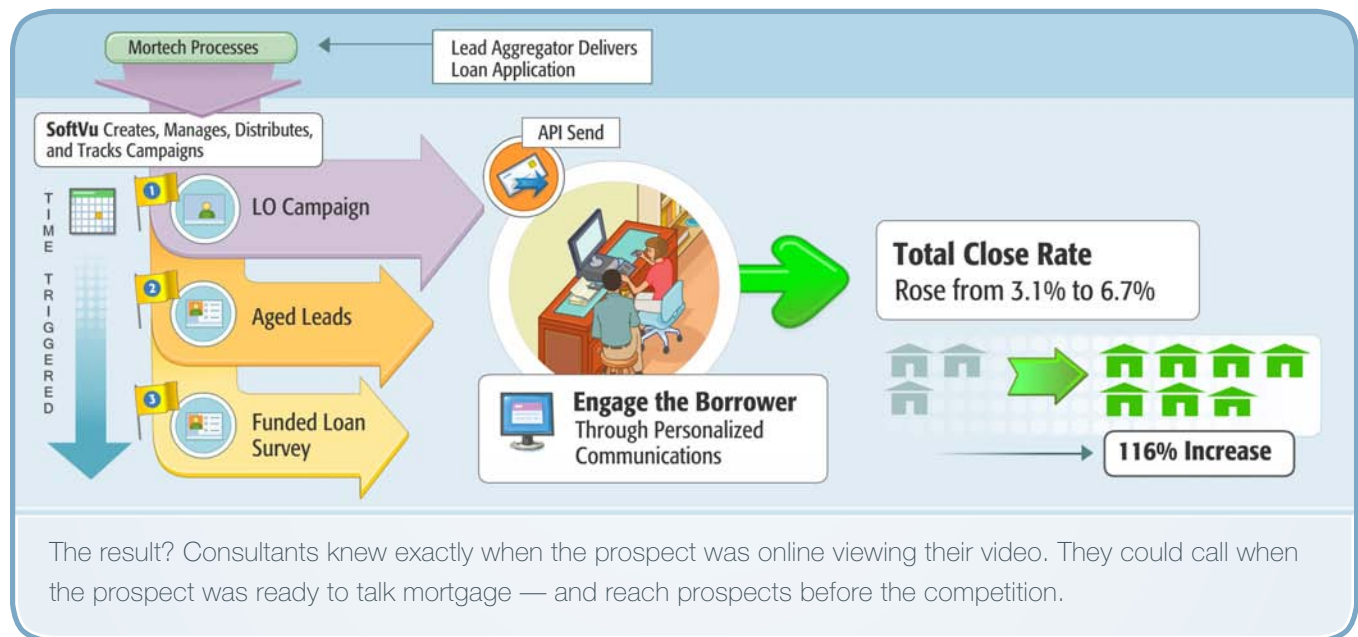
The Success

Within four months of launching the automated campaign, Diversified's close rates rose from 3.1 to 6.7% — an increase of 116%.

Diversified was able to:

- Improve business decisions with real-time campaign results and tracking.
- Optimize their marketing campaigns to improve click-through rates and get a full picture of their sales cycle.

“We would not have had as many opportunities to close loans without the SoftVu marketing campaign working for us,” said Aaron Hill, CEO of Diversified Mortgage Services. “We were able to secure qualified leads when we were top of mind with the borrower. It increased our contact rates and our loan consultants were able to build relationships instead of tracking down unqualified leads.”



About SoftVu. A leading provider of marketing automation systems, SoftVu was founded in 1999. SoftVu has earned a reputation for engaging customers with personalized, relevant, and timely communications to help businesses close sales. The company creates automated campaigns for lead generation and incubation, sales follow-up, and client retention programs. SoftVu solutions include on-demand marketing automation software, creative and campaign management professional services, and industry-specific marketing Best Practices. For more information about SoftVu, visit www.softvu.com.

Related links:

SoftVu Online Lending Solution:
www.softvu.com/flash/online_lending/start.html

SoftVu Diversified Press Release:

www.softvu.com/index.php?/content/view/156/189/