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## Case Study:

# Lead Management module provides the “speed to lead” competitive advantage needed to win

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### Client Context

- Ovation Home Loans was struggling to be the first company to contact potential mortgage customers
- Fast growing Ovation was looking for “Best in Class” solutions to quickly scale their operations
- Distribute hundreds of daily internet based leads automatically to one of the 120 loan officers – and report on them in detail

### Engagement Objectives

- Implement OptifiNow’s Leads onDemand module quickly
- Custom integration into Ovation’s phone system
- Automatically trigger personalized emails and direct mail to customers at various touch points throughout the sales process
- Automatically generate loan proposal document to customer

### Solution

- “Speed” – get in touch with customers faster than competitors
- “Scalability” – allow for new loan officers to be up and running immediately
- “Automation” – equitably and automatically route leads to the correct loan officer on changing business rules

### Results

- 9X increase in “speed to lead” making Ovation Home Loans one of the fastest in the industry
- Month over month sales increases
- 6X growth in sales force was easily managed
- 10X growth in number of leads from over twenty sources were automatically and accurately routed

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#### CONTACT US

Empower your local agents, call center reps and employees to grow revenue and deepen customer relationships through multichannel marketing engagement that is measurable.

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