



Velocify LeadManager Essentials

Enable your LOs to drive more business and close loans faster. No LO login required!

Products and Services

Velocify LeadManager Essentials™ is an automated multi-channel marketing and communications solution that enables distributed retail loan officers to drive more business and close loans faster.

In today's competitive lending market, building strong customer relationships is critical to a retail loan officer's success. Unfortunately, LOs are tasked with learning several tools and systems. As a result, generating business, nurturing prospects, and delivering consistent updates to borrowers remains a challenge.

45% of LOs fail to stay connected with prospects
90% of borrowers want consistent communication

Due to inconsistent communication, lenders are losing online business and borrowers are often left frustrated and in the dark on where they stand throughout the loan process.

LeadManager Essentials provides you with an easy-to-use solution that delivers personalized, automated multi-channel communication to prospects, borrowers and partners throughout the entire customer lifecycle on behalf of your loan officers. No login required and 100% LO adoption guaranteed.

Benefits

- Drive more business
- Close loans faster
- Deliver a better borrower experience
- Improve LO productivity

Why LeadManager Essentials?

- Access real-time Encompass® data
- Get marketing automation and automated communications in one package
- Work with a single vendor

Stand out with automated and personalized multi-channel communication throughout the entire customer lifecycle.



LeadManager Essentials enables you to:

Pre-Application:

- **Generate prospects:** Drive more business with the ability to create and execute targeted marketing automation campaigns to prospects that are tailored to their situation.
- **Immediately reach out to incoming web leads:** Nearly one-third of incoming web leads are never followed up on. Improve LO productivity by automatically delivering new opportunities to your loan officers.
- **Follow up on abandoned applications:** Nearly 43% of consumers fail to complete online applications. Convert more applications into loans with the ability to send automated email and text communication to borrowers that abandoned applications.

Post-Application:

- **Nurture pre-approvals:** 30% of borrowers keep shopping for a lender after pre-qual approval. Stay relevant and help LOs build relationships with borrowers by automating email and text communications.
- **Follow up on documents:** Staying with a manual process can add eight or more days to the loan lifecycle and results in lost revenue. Close loans faster with automated email and text follow up to borrowers on due or missing documents.
- **Deliver milestone updates:** Over 90% of borrowers expect consistent communication. Deliver a better borrower experience with automated email and text communication to borrowers and partners triggered by key events in Encompass®.

Post Close:

- **Nurture customers:** Build repeat business with the ability to send post close surveys, quarterly business reviews, newsletters, and customizable marketing campaigns to borrowers and partners.



Reach us at: 1-888-955-9100 or sales-mortgagetech@ice.com to learn more.