

Connect Leads with the Best Loan Officer to Meet Their Needs at Scale

Enhance lead management with advanced, intuitive lead routing capabilities through the Total Expert Workflow Engine.

High quality leads are getting more expensive and more difficult to acquire. Efficient and accurate lead assignment is critical to delivering a great customer experience, and ultimately realizing return on investment (ROI) on your lead generation costs and efforts. Ensure your leads are routed to the best loan officer who can meet the customer's needs and close the deal with comprehensive lead distribution logic in an easy-to-use workflow builder.

HOW IT WORKS

- Import and deduplicate leads from a variety of sources and link them to existing contact records.
- Automatically assign leads to the right loan officers at the right time using advanced distribution logic, including loan officer qualifications and availability, and lead attributes and characteristics.
- Create filters and conditions to further customize workflows, such as geography, lead volume, loan types, property values, military status, and more.
- View workflow reporting and analytics to identify areas for improvements and optimization.

BENEFITS

-  **Increase conversion rates and sales** with advanced lead routing logic, rules, and filters.
-  **Create efficiencies and sales productivity** by easily managing throughput and rewarding performance.
-  **Save time** by visualizing complex lead routing processes from end-to-end on the Workflow Engine canvas editor.
-  **Quickly adapt and optimize workflows** based on data-driven insights.