



Carrington

Carrington - a leader in online mortgage brokerage services based in Southern California. Carrington's goal is to streamline the mortgage process by providing a seamless integration between the consumer, the loan team members, Salesforce and the loan origination system.

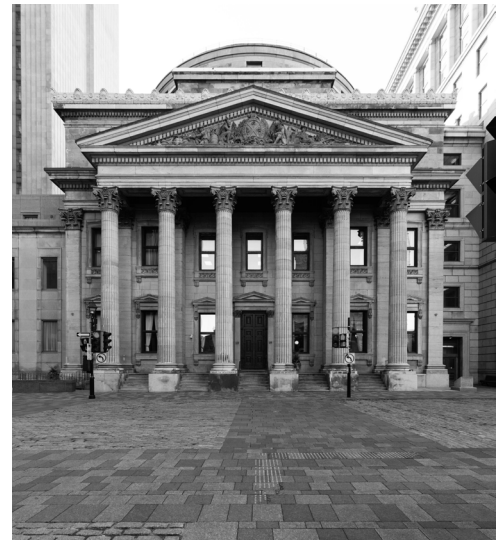
Pain Points:

- + Required integration of all platforms including the external customer direct website to provide a seamless view of clients and loan process
- + Unable to quickly respond to potential leads without an integrated Call Center Telephony integration
- + Customers required an integrated user friendly online loan application
- + Unable to provide quick access to customer data due to lack of visibility
- + No marketing automation to provide customers with upsell and cross sell opportunities
- + Searching for a fully automated platform to remove manual work

Goals:

- + Increase marketing capabilities for connecting directly with consumers
- + Create custom workflow process to include automations and system integrations to increase efficiency
- + Design robust and flexible solution to allow for growth as business evolves
- + Provide the ability to create 1 to 1 relationships with customers to reduce the loan life cycle timeframe and gain customer trust
- + Implement customer support case management solution to increase customer satisfaction and improve service
- + Substantially improve reporting analytics (KPI actionable dashboards/ performance reporting)

Key Integrations: Five9 CTI, Encompass Loan Origination System, web to lead integration with Carrington Connects/Vylla, Zillow, Loan Application integration with BeSmartee



Results:

- + Significantly increased competitive advantages (Consumer Direct)
- + Increased new leads/opportunities with advanced marketing campaigns
- + Advanced automated workflows ensure tasks and follow-ups are occurring at the right time with escalation when needed
- + Integrated all additional systems into one platform to gain a seamless view, follow-up activities and loan process status
- + Advanced case management and support capabilities
- + Infinite system scalability/product growth due to innovative extensible platform