REF-OR-M DIGITAL MARKETING & CX SOLUTION FOR MORTGAGE

The REF-OR-M solution built for Digital Marketing & CX Solution for Mortgage is a pre-configured, reference solution, tailored to manage the Sales lifecycle and digital marketing for the Mortgage industry. Our solution comprises of end to end process flows, Functional solution components, proven best practices from successful D365 transformation engagements in this area, brought together in a unique solution concept to achieve efficiency, business value and cost optimization for Lead management, digital campaign management and loan office experience.

The REF-OR-M Solution for Digital Marketing & CX Solution Mortgage industry offers solution components for efficient lead management with lead to loan sales management, campaign management features and planning to execution, analytics and enhanced experience.

REF-OR-M Framework

- Accelerated Cloud Transformation Methodology
- Business Value Articulation & Advisory
- Pre-Configured Solution
- Implementation Workbench
- Digital Solutions
- Point Solutions & Business Content

The Digital Marketing & CX Solution for Mortgage industry is built using the Reference Organization (REF-OR-M) Framework which is a pre-packaged solution enabling faster deployment, reduced TCO, enhanced experience and superior quality

Solution Capabilities & Business Process Breakdown

The solution built on Microsoft Dynamics Customer Engagement platform combines three core business functionalities powering loan officers, realtors and marketers to manage end to end lead-to-loan lifecycle :

Marketing
Multi channel campaigning and lead capture features

Lead-to-Loan Sales
Customer relationship, loan processing system integration

Analytics
Insights, Next Best Actions, Dashboards and Reports

Key Highlights of the solution

- Ability to integrate to Zillow, Realtor.com, Leadpops, Linkedin and more
- Office 365 and outlook integration for easier customer interaction
- Dialer and SMS integration for effective communication
- Campaigns to email, SMS and social media channels
- Easy to integrate and automate with loan processing systems
- Mobile and Tablet App
- Advanced segmentation and scoring to for higher conversion rates
- Sales performance and forecast Management
- Advanced dashboards, analytics and insights
- Digital Asset Management and campaign design features
- Adobe DocuSign and SharePoint integration for electronic documentation
- Cloud based solution for easy maintenance and faster ROI

Key Benefits

- Digi-Tech / Industry / LOB Expertise specific to Mortgage Industry
- Agile & Accelerated Approach to deploy CX solution for Mortgage
- Enhanced Experience for Loan officers & end Customers alike & ease of management
- Systematic Management of Leads and Campaigns with Automation
- Pre configured Integration enabling Reduced TCO & Faster Deployment
- End-to-end Offering for CX for Mortgage across Marketing and Sales

Applicability of the Solution

- **Greenfield implementation**, extensions to existing landscape for Sales and marketing, ability to add robust and digital solutions

- Focus on building application in **agile and incremental way**

- Enablement for business users early in the game and discover the solution with a focus on efficient lead management and loan officer experience

- Leverage best practices from successful Dynamics 365 transformation engagements to achieve greater business value
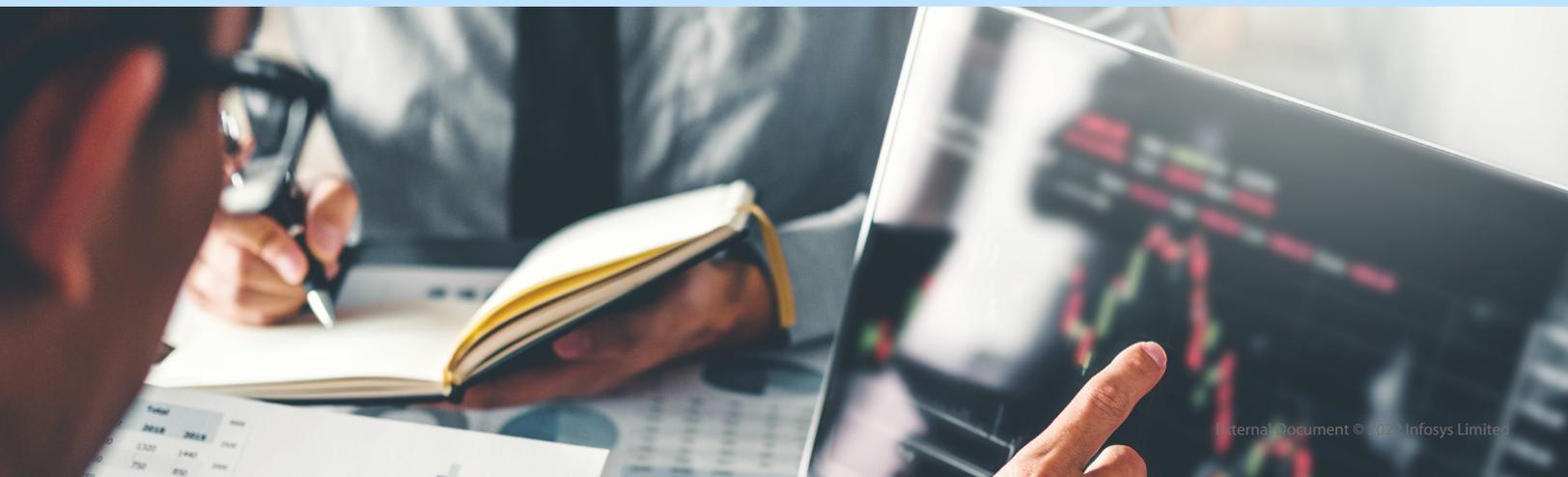
Deployment Approach

Initial Due Diligence

Using our ACE program

Business Value Articulation

about the business value, solution alignment , processes break-down / design, and road-map and how the foundational components are relevant to the Mortgage Sales and marketing cycle enabling better conversions and customer experience

Pre-configured solution

- Ready to run foundational configurations with framework to add customizations specifically to a business/ integration

Point Solutions, Business Content & Digital Solutions

- Extension Solutions specific to Loan Officer experience, Analytics
- Digital Solutions available in ready to deploy state, specific to context for easy to use methods of managing sales and marketing

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