



ENHANCING CUSTOMER EXPERIENCE

MORTGAGE BROKERS

In this space, clients are basically surrounded by a plethora of mortgage financing options, thanks to omnipresent marketing across all traditional and digital media.

Consumers are more informed than ever, and as a result, are virtually guaranteed to comparison shop. Distinguishing yourself in this crowded segment can be accomplished by delivering exceptional client experience.

UNIVERGE BLUE ENGAGE Contact Center helps mortgage brokers to differentiate based on service, rather than just pricing and margins.

UNIVERGE BLUE® ENGAGE MORTGAGE BROKERS



MORTGAGE BROKERS CHALLENGES

- › Appointments tend to be extremely highvalue and must be maintained
- › Build trust and deliver highly personalized service, with attention to details and records that can be quickly recalled
- › Getting calls to the right agents / brokers is mission-critical
- › Comply with recording retention requirements and provide peace of mind
- › Respect outreach preferences and comply with CAN-SPAM / CASL
- › Due diligence is mandatory, but response speed is of the essence
- › Keep up with busy client schedules and find times to talk
- › Evaluations must be conducted to financial standards, stricter than those applied to a "typical" CSR

CONTACT CENTER SOLUTIONS

- › Use Dynotes to ensure that clients are reminded of upcoming appointments, and give them an option to respond and/or make changes if needed
- › Capture detailed customer notes, call outcomes, flag for follow-up, and even voice recordings, all in real-time via CCA
- › IVRs can look up existing client records and match to the correct mortgage agent; new inquiries can be mapped to queues with skills-based routing so a highly qualified Contact Center agent receives the inquiry and helps direct the caller
- › All calls can be automatically recorded to minimize risk; strict security and compliance standards in place at all levels
- › Leverage Dynamic Notifications to keep marketing outreach lightweight, and promptly honour unsubscribe requests
- › Rapidly respond to any missed calls and/or voicemails, with visual indications pushed down to individual agents as they start the day

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