Velocify LeadManager Essentials

Lower your costs, maximize your profits, and turn more applications into loans.

Lenders are losing nearly 50 percent of their online business because prospective borrowers don’t receive follow-up. Velocify LeadManager Essentials™ helps lenders kick start conversations and increase pull-through rates by automating multichannel engagement between loan officers and borrowers.

Ensure immediate response for key trigger events:

- Incomplete loan applications
- Incoming leads
- Preapprovals at risk of attrition
- Milestone marketing
- Document follow up

When an event occurs, a personalized text automatically goes out on behalf of the loan officer, who is notified by email. This gets the conversation started.

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

A new approach to engagement

LeadManager Essentials is not just another tool that your loan officers won’t use, but rather a new approach to engagement. This automated, affordable, easy-to-use solution ensures your prospective borrowers don’t fall through the cracks, while enabling your loan officers to spend their time focused on higher-value, moneymaking activities in the field.

- More cost-effective than a full-blown CRM system
- Ready to deploy in weeks, not months
- Starts delivering ROI day one
Enhance the borrower experience

- Automates timely and effective communication with borrowers via text, email and phone
- Minimizes abandoned application rates through automated and consistent communications

Initial borrower engagement becomes “set it and forget it” easy

- No new system to deploy to loan officers
- No additional logins or passwords for loan officers to learn
- Communications are automatically routed to your loan officers’ existing email inbox for follow-up

You stay in control—and stay compliant

- Everything is centrally managed from your corporate office
- All emails and texts are customized and corporate-approved, for consistency and compliance
- You have the option of deploying LeadManager Essentials to all loan officers or a subset of loan officers
- You can enable loan officers to opt out of the automation for specific buyers

Gain visibility into the engagement process

- A full audit trail
- Insight into your loan officers’ performance—including if they responded, how quickly they responded, and how many of their efforts resulted in conversion
- Defensible communications reporting, including logged email, text transactions, and logged text conversations

Everyone benefits

- Your borrowers get a better experience
- Your loan officers sell more
- Your organization closes more loans, faster and more profitably
- You stop leaving money on the table