



CLIENT:

# CitiMortgage

## CHALLENGE

To develop a Customer Engagement Portal that would enable CitiMortgage Loan Consultants (LCs) to maintain an active and engaging dialogue with their customers and prospects at various stages of the mortgage acquisition process.

Loan Consultants desired a secure platform to send personalized direct mail communication. Although crucial to the decision making process, managing the logistics of the ongoing communication process was time consuming and inefficient.

CitiMortgage wanted a fully automated system that was easy for the LCs to participate in and would allow each LC to manage their prospect lists in a secure, online and isolated repository.

## SOLUTION

Digital Wavefront created a secure online portal that enabled LCs to deliver personalized communication via direct mail. A virtual address book allowed LCs to maintain their prospect list and select from that list for each upcoming communication.

Built-in email workflows and trigger-based emails allowed the system to deliver alerts and confirmation emails.

An XML data feed from USPS, the logistics provider, enabled LCs to track the packages in real-time, enabling them to precisely schedule a follow-up phone call.

## RESULTS

### Loan Consultant Portal

Digital Wavefront developed a secure yet easy-to-use online portal that automated all aspects of the customer engagement process. It enabled LCs to send targeted direct mail and engage with their customers and prospects.

### Virtual Contact Manager

A virtual Address Book enabled Loan Consultants to manage their prospects online. It enabled them to deliver a highly personalized experience based on prospect preferences.

### 35% Increase in LC Participation

Loan Consultant participation increased 35% soon after the launch of the pilot.

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