



Customer Success Story

A Leading Mortgage and Refinancing company close more deals via **implementing a scalable, enterprise-wide customer engagement solution using Salesforce**

About the Client

The client offers mortgage lending solutions in the United States. They offer mortgages and home buying programs such as refinancing option

Solution

- DemandBlue created a custom formula that compares the domain in a lead's email address to all website domains listed in existing accounts to identify a match
- Implemented a blended lead scoring and grading model, the leads assigned to sales are higher quality

Benefits

- ✓ Sales Managers and Account Executives have more time to close deals
- ✓ Increased sales efficiency due to improved insight into leads and better lead quality.
- ✓ Improved lead follow-up by identifying the 25% of qualified leads in their database.
- ✓ Built healthy sales pipeline, and 30% higher deal closing rates

Salesforce: Pardot

Technologies: Lead scoring, Lead grading, Lead automation, Workflow automation, Financial services

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