

Velocify LoanEngage[®]

Convert more leads into loans with unified sales and marketing.

As a sales leader you know what it takes to maximize production, but implementing consistent sales and marketing processes across your team can be difficult.

Velocify LoanEngage is the only unified solution built specifically to help retail mortgage companies unlock their revenue potential by supercharging loan officers' productivity, ensuring compliance, and enhancing visibility.

Improve your retail mortgage ecosystem with a tool that benefits all parties involved

- Executive leadership
- Branch manager
- Realtor
- Loan officer
- Borrower

“We’re excited about the capabilities Velocify LoanEngage has to offer our loan officers. With LoanEngage they can manage and leverage their most productive referral sources, while ensuring leads don’t fall through the cracks. We’re looking forward to giving our loan officers a tool to help them close more loans.”

– Mark Wambold, Area Manager, Fairway Independent Mortgage

Productivity

Branches must deal with a multitude of sales and marketing activities that burden loan officers and are easily overlooked. LoanEngage delivers a mortgage-specific workflow and automation to increase productivity by as much as 4 times, while delivering a better customer experience.

Compliance

Enforcing compliance in all aspects of the sales and marketing process can be challenging. LoanEngage comes with content that has been vetted and approved by your corporate office.

Visibility

Having data spread across disparate systems is problematic. Track all activities, from any lead source to close, and beyond. Integration to Encompass[®] gives customers unprecedented visibility throughout the lead-to-loan process.

Benefits

- Timely and automated multi-channel communications
- Easily manage lead flow from any source
- Mortgage-specific automation to increase productivity
- Ensures optimized sales process to make data-driven decisions

For more information contact:
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Lead management

- Effectively manage leads from any source including: website forms, referral partners, social media, lead aggregators and others
- Track and measure lead source performance to see which loan officers are producing results and which need more attention
- Send co-branded communications to close more loans by showing borrowers unified messaging

Sales lifecycle management

- Multi-channel communication keeps you connected with borrowers at the right time in the right way via phone, email or text
- Powerful lead assignment and prioritization ensures proven contact strategies are followed and borrowers don't fall through the cracks
- Never miss an opportunity to connect with our optional integrated click-to-call dialer for loan officers who really want to accelerate productivity

Marketing automation

- Automate communications at every stage of the loan process with custom email templates and SMS texting
- Ensure compliance and consistency with corporate-approved emails and texts
- Integrates with Encompass CRM™ to trigger post close campaigns and automated annual reviews

Reporting and analytics

- Give loan officers visibility into borrower and referral activities to make better decisions about where to focus their efforts with a unified dashboard
- Gain high-level insight into key performance and productivity metrics based on loan officer, branch, lead source and more
- Protect your company with historical records of compliant communications from all stages of the sales and marketing process