



Accelerating Client Engagement Through Botsplash SMS Features



Mutual of Omaha
MORTGAGE

www.botsplash.com

TABLE OF CONTENTS



The Synopsis	03
Lead Management	03
Listeners	05
The Botsplash Mobile App	05
Organization Tools for Loan Officers	06
Learn More	09



SYNOPSIS

2022 was a year for the history books in the mortgage industry. Record high interest rates combined with inflation caused the housing market to stall. This left mortgage companies with the mission of finding creative ways to keep borrowers engaged and involved in the mortgage process with a leaner team. Gone were the days of easy closes and more leads than you knew what to do with. It was time to be smart with your strategies, and loan officers needed to be quick and ready to assist. As Q4 started, Botsplash's client, Mutual of Omaha Mortgage, came to them with an idea: ***to utilize unique tailored SMS messaging and campaigns to increase their engagement with borrowers.***

The Botsplash team worked with Mutual to develop solutions that would accommodate their needs by utilizing current features offered on the platform. Since launching, the results have spoken for themselves, as Mutual of Omaha's contact rates have improved from 12% to 60%!

LEAD MANAGEMENT

The first step in increasing engagement is ensuring leads are being routed to the right agents. Mutual utilized Botsplash's lead management features to make this happen. Botsplash implemented something called a ***"Doorbell Rule"***, which pertains to lead management and the proper routing of leads. When a lead is assigned and the visitor responds, a 15-minute timer will start. If an agent has not responded to a message within this 15-minute window, the lead will automatically be taken from them and assigned to another agent. The doorbell rule not only ensures the agents are not bogged down with too many conversations but also ensures the visitor gets a response as soon as possible. In a speed-to-lead environment, quick responses are critical.

Additionally, Mutual utilized Botsplash's **lead capping capabilities**. Rules were enabled to ensure that any agent could only accept three leads per hour. This not only ensured that agents didn't overextend and take all of the inbound leads, but also guaranteed that the visitor received a timely response from their company.



“We have been using Botsplash for some time now, and I can confidently say that it has transformed how we communicate with our clients. The platform's interface is user-friendly and has various features that make texting more convenient and efficient. One of the standout features Botsplash was able to implement for us is the doorbell feature. This feature gamified the LO experience while improving the customers' experience. Another feature we appreciate is the ability to filter conversations by engaged status. Often a conversation may stall out, and giving the LO the ability to search for these last convos to re-engage the customer is a huge advantage! Lastly, the Botsplash team is the best in class. Their ability to update and create a customizable platform is indispensable. I highly recommend Botsplash to anyone looking for a reliable, feature-packed, secure texting app. The results speak for themselves!”

Chad Larkowski,
Branch Manager, Mutual Of Omaha Mortgage



LISTENERS

Among one of the biggest challenges Mutual had was lost opportunities when attempting to **re-engage with visitors who had either stopped responding or the conversation had fizzled out**. Botsplash was able to create a strategy utilizing its listeners to develop a solution. Mutual took advantage of its CRM integration to identify how long agents had waited for visitors to respond. If the amount of time elapsed reached or exceeded 24 hours, an automatic text message was sent out with a "?" as a reminder to the visitor. Thanks to the authenticity of this approach, users reported an increase in re-engaged leads.

Listeners are designed to send based on a trigger within the business' CRM however, listener messages are not one size fits all. Visitors actively conversing with a loan officer or have been over the past few hours should not receive an automated response or be reassigned to another agent if they also submitted their information on the site overnight. Botsplash offers flags that can be enabled within listener settings to help with this. **Options such as "skip in conversation for the next two hours" or "retain agent access upon response" can be selected before sending a message to ensure the flow of relationship building is not broken.**

MOBILE APP

One of the most important strategies when it comes to the all-important speed-to-lead mentality is giving loan officers the convenience of working anywhere. Botsplash offers a user-friendly mobile app available on Apple and Android devices. As a part of the best practices implemented by Mutual, all loan officers were encouraged to download the app to give them the ability to answer leads from anywhere. **Among all Mutual users with an active Botsplash account, it was determined that 70% of them had downloaded and were actively using the mobile app daily.**

Mutual of Omaha Mortgage's agents have responded very positively to the ease and convenience of being able to engage with a lead from their phone. This means that regardless if they're on the couch at home or in the office, they will always be **ready to converse with a lead.**



ORGANIZATIONAL TOOLS

When increasing client engagement, ensuring agents can stay organized is just as important as any SMS strategy. Botsplash offers a multitude of tools within the platform's dashboard agents are able to utilize to ensure organization is seamless. "Engaged filter" is a view agents can use on the message dashboard that will only show active conversations in relation to all messages sent. **Mutual agents can send upwards of 200 messages daily, so this filter helps ensure that no responses are lost.** Additionally, agents frequently use the "bookmark filter" to save important or time-sensitive conversations for easy access.

Moreover, Botsplash has also created advanced filters to give agents additional flexibility regarding their dashboard view and customization options. As a part of their daily activities, Mutual agents will utilize the "visitor last engaged" and "agent last engaged" functions to search through all leads. Doing so enables agents to identify leads that have yet to respond for a certain amount of time or that have yet to be responded to in order to increase the visitor experience.



"Botsplash passes with flying colors! First, the addition of texting to prospect new business has been a game changer for my production. I can work on the phone and continue prospecting throughout the day, providing more at-bats with the same output. The web client offers tools to increase workflow efficiency, such as conversation openers and canned texts, and customizable features to ensure I keep track of conversations. The mobile app is also nice, mixing simplicity and ease of use with the flexibility of working on the go. I would recommend high-priority integration into their business to any LO."

**-Sylas S.,
Loan Officer, Mutual Of Omaha Mortgage**



REPORTING

SMS campaigns encompass a large part of Mutual's overall communication strategy. The best way to understand the success and performance of each campaign is through in-depth reporting within Botsplash and closed deals. Botsplash offers multiple reports within the platform that make analysis much easier. Spam is one of the biggest battles a company needs to fight when launching an SMS campaign. Once a client notifies Botsplash's client success team of an upcoming campaign, they can then advise the client on the optimal campaign setup and then closely monitor spam rates within the platform to ensure the campaign has successful delivery ratings. Additionally, **Botsplash offers in-depth campaign reports that give an organization insight into how many messages were not sent due to a bad phone number, do not contact lists, system failures, and more.** Additionally, these reports highlight which messages were opened, led to an engaged conversation, and ultimately converted into a locked loan.

RESULTS

Ultimately Botsplash's solutions provided Mutual of Omaha Mortgage with undeniable results. By taking Mutual's total contact percentage, their contacted by SMS percentage, and the percentage of new loan submissions pre and post-Botsplash implementation, the following results could be concluded:

- ✔ Mutual saw its total contact percentage increase by 10%.
- ✔ Mutual's contact via SMS percentage improved from 7% to 23%.
- ✔ Mutual's text message submissions went up 99%, nearly doubling.



“If you’re searching for a reliable, innovative SMS and Chat engagement solution, look no further than Botsplash. Their team consistently exceeds expectations, offering real-world solutions and exceptional service. They took the time to understand our specific needs and provide a tailor-made solution that greatly improved our operations and contact rates. Some of these solutions include:

- ✓ The ability for users to custom filter conversations based on engagement status
- ✓ Ability to send dynamic messaging that will send a message with a custom URL attributed to a specific LO, vs. a general URL based on defined parameters
- ✓ Dedicated mobile apps to keep things natural and user friendly
- ✓ Ability to define reassignment on unanswered responses from the client etc.

We are thrilled with the results and highly recommend Botsplash for engagement solutions.”

Nathaniel Cruz,
System Admin, Mutual Of Omaha Mortgage

REFER A FRIEND →

Scan the QR code, refer a friend, and get rewarded





WHAT OUR TEAM HAS TO SAY



“Working with Mutual of Omaha Mortgage on these unique initiatives has been a pleasure. The client success team at Botsplash is not only here to provide support but to help brainstorm solutions to issues that come with an unpredictable market. Utilizing the Botsplash features the way we did here just speaks to how important it is to cater the visitor experience to their needs and how powerful an omnichannel platform can be. I look forward to many more innovative projects with Mutual of Omaha in the future!”

**Elizabeth Boylan,
Client Success Manager, Botsplash**

LEARN MORE

For more information about the steps taken to gather this data or how Botsplash can offer similar solutions for your business, [schedule a demo](#) by clicking the button below. Botsplash communication specialists will work with you and your team to determine if an omnichannel consumer engagement solution is the correct choice for your business.

[SCHEDULE A DEMO](#)