botsplash

Streamlining Operations: Botsplash Bookme and Subaccounts

Rate

TABLE OF **CONTENTS**

INTRODUCTION

Rate, a prominent player in the mortgage lending industry, has established itself as a leading provider of home loans and financial services. With a strong presence in the market, Rate prides itself on delivering exceptional customer service and innovative solutions tailored to meet the needs of its clients. Prior to implementing Botsplash, the company relied heavily on traditional communication channels such as phone calls and emails to interact with customers. While these methods were effective to some extent, they often led to delays in response times and inefficiencies in managing customer inquiries and sales processes.

Enter Botsplash, a cutting-edge communication platform designed to streamline customer interactions and enhance sales processes. By integrating Botsplash into its operations, Rate aimed to address the challenges posed by its previous communication strategies. Botsplash offers a range of features including AI-powered chatbots, automated responses, and real-time messaging capabilities, all of which contribute to improved efficiency and effectiveness in customer communication and sales. This implementation marks a significant shift in Rate's approach, promising enhanced organizational improvement and a higher level of customer satisfaction and engagement.

BOTSPLASH FEATURES OVERVIEW

With a commitment to keeping the consumer experience at the forefront, Botsplash strives to create an environment where agents can consistently deliver high-quality and personalized interactions. By prioritizing user-friendly features, Botsplash enables agents to maintain a client-centric approach, enhancing the overall consumer experience through seamless and responsive communication.

BOTSPLASH + RATE

Rate utilized a suite of Botsplash features tailored to optimize communication and sales processes. Key functionalities such as **subaccounts** offer a structured approach to managing various instances within the organization independently while maintaining centralized control. This segmentation facilitates seamless operations, allowing different departments or teams to efficiently cater to specific needs or regions. Additionally, the **Bookme** platform streamlines appointment scheduling by providing calendar integrations, social media links, and direct agent chat, offering clients a hassle-free experience while enhancing agent productivity.

Effective communication and sales management are paramount for Rate's business model. As a leader in the mortgage lending industry, the company relies heavily on fostering strong client relationships and effectively managing sales processes. Clear and timely communication is essential for addressing customer inquiries, providing updates on loan applications, and ensuring a smooth transaction process. By leveraging advanced communication tools like Botsplash, Rate can enhance customer satisfaction, improve sales productivity, and maintain its competitive edge in the market.

Rate noted the following benefits when adopting Botsplash

1 Smooth Onboarding
2 Dedicated Client Support Specialist
3 Custom Metric Tracking
4 Cross-Brand Synchronization

BOOKME: ENHANCING SALES AGENT PRODUCTIVITY

Bookme, a standout feature within Botsplash, revolutionizes scheduling processes for Rate's sales agents. It serves as a dynamic tool, allowing agents to effortlessly create personalized landing pages tailored to specific customer needs. These landing pages offer a seamless booking experience, integrating calendar availability, direct chat functionalities, and custom links which can be used for applications or direct website clickouts. With Bookme, Rate's sales agents can skillfully manage appointments while providing clients convenient access to schedule meetings or consultations at their convenience. The flexibility and customization options afforded by Bookme empowers agents to optimize their workflow, streamline communication, and deliver a superior customer experience.

The introduction of Bookme brings a host of benefits to Rate's operations, notably in enhancing scheduling capabilities and elevating customer engagement. By centralizing booking processes through intuitive landing pages, Bookme simplifies the scheduling journey for agents and clients, reducing the time and effort required to coordinate appointments. This streamlined approach not only improves customer satisfaction but also enables Rate to establish stronger connections with clients, ultimately driving business growth and success in the competitive mortgage lending landscape.
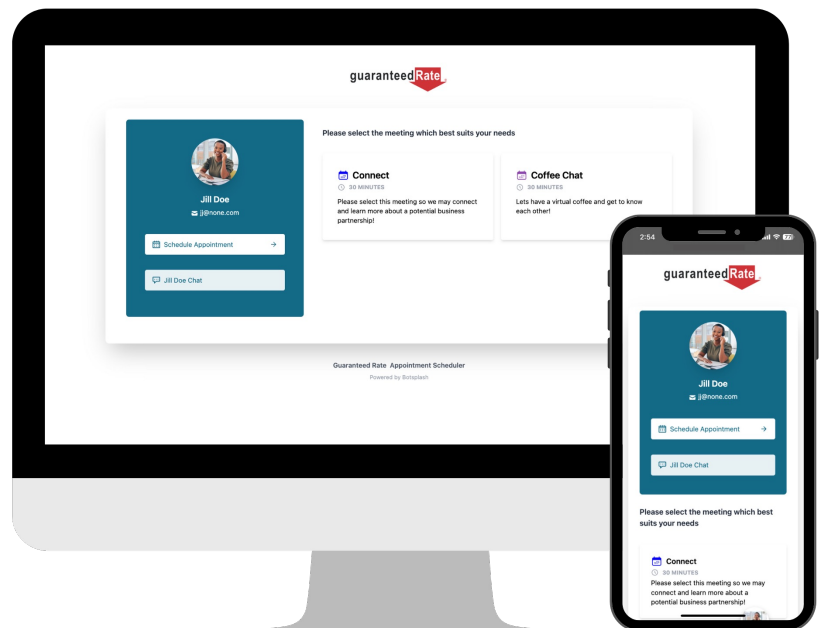
SUBACCOUNTS: STREAMLINING THE ORGANIZATIONAL STRUCTURE

Subaccounts, a cornerstone feature of Botsplash, offer Rate a versatile solution for managing its multifaceted organization. These subaccounts enable distinct segments of Rate's operations to function autonomously while maintaining consistency under the overarching brand umbrella. Through sub accounts, various departments or regional branches can customize their communication strategies and workflows to suit their unique needs while adhering to the company's brand guidelines. This ensures a unified brand image across all touchpoints while providing the flexibility needed for different teams to operate efficiently within their respective domains.

The implementation of subaccounts brings forth a myriad of benefits for Rate, significantly enhancing organizational efficiency and scalability. By allowing different facets of the organization to operate independently, subaccounts streamline internal processes, reducing bottlenecks and promoting agility. Moreover, the scalability offered by subaccounts enables Rate to adapt swiftly to changing market conditions or business demands. For instance, regional branches can tailor their communication strategies to local markets, fostering stronger client connections and driving growth. Additionally, the centralized control provided by subaccounts ensures that all segments of Rate's organization uphold the company's standards of quality and service excellence, regardless of their geographical location or specific focus areas.
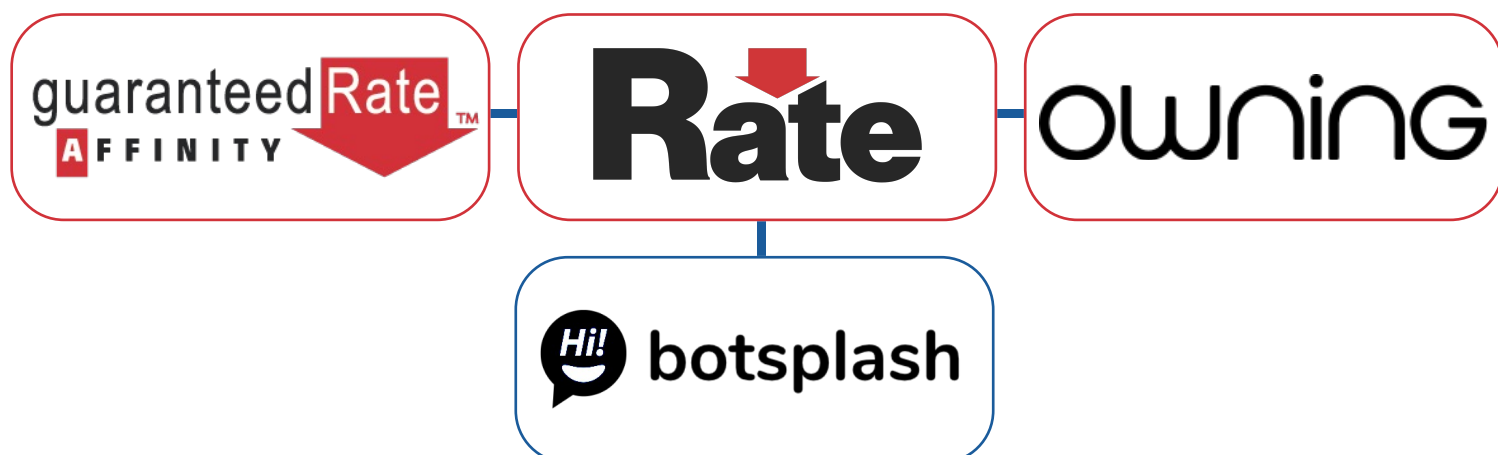
INTEGRATION AND IMPLEMENTATION

Integrating Bookme and subaccounts into Rates organizational processes demanded close collaboration between our client success and implementation teams. By understanding the desired outcomes for both internal operations and consumer experiences, features were customized to align seamlessly with Rate's needs, ensuring enhanced usability and functionality. Throughout the implementation process, extensive training and support were provided to Rate's users through numerous touchpoints, demos, and ongoing communication with our client success team.

This approach facilitated a smooth transition, empowering users to effectively leverage Bookme and subaccounts to optimize productivity and customer satisfaction. Overcoming potential challenges specific to Rate's environment involved meticulous attention to detail, ensuring that all subaccounts and Bookme pages seamlessly adhered to the company's branding guidelines, thus maintaining a cohesive and professional image. By addressing obstacles proactively and implementing tailored solutions, Rate successfully navigated the integration process, unlocking the full potential of Bookme and subaccounts to drive organizational success.

Working with Rate to tailor Botsplash to their specific requirements has been a highly rewarding experience.The client success team at Botsplash is committed not just to offering support, but also to contributing ideas for solutions in response to the challenges posed by a fluctuating market. The way we applied Botsplash's features in this instance underscores the significance of tailoring the visitor experience to meet their specific needs, and demonstrates the effectiveness of an omnichannel platform. I am excited about the prospect of working on more innovative projects with Rate moving forward!

Joseph Howe
Implementation Specialist
Botsplash

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Jeff Haddick
Senior Product Manager
Rate

Rate has been working with the Botsplash team for a little over a year now and our experience has been exceptional. What drew us to the Botsplash platform was an array of features that have streamlined our ability to engage with customers how, when and where they want. Live chat, meeting scheduling, SMS, reporting/ analytics and system integrations were all on our wish list and they've provided us with everything we need and more.

We recently took advantage of their subaccount feature which allows us to group agents serving a particular brand and has significantly enhanced our workflow. Isolating teams into subaccounts has made onboarding, management and reporting on each group's performance much easier. This level of customization is invaluable, especially when certain groups require specific functionalities tailored to their requirements.

The level of support and responsiveness from the Botsplash team has been outstanding. From the onset, they've been proactive in addressing our needs and concerns, consistently demonstrating their commitment to our success. Their response time is commendable, and their willingness to listen to our feedback and implement necessary changes is truly refreshing. In fact, we recently expressed the need for a generic mechanism for customers to create meeting events—a feature that wasn't previously available at the team level. Within a matter of weeks, the Botsplash team not only acknowledged our request but also delivered a tailored solution that perfectly met our requirements.

To anyone in search of a comprehensive chat and SMS solution, I highly recommend scheduling a demo with the Botsplash team. Their expertise and personalized approach will undoubtedly help you unlock the full potential of your customer engagement strategies.

RESULTS AND SUCCESS STORIES AT RATE

To assess the influence of Bookme on Rate's business operations, we utilized key metrics sourced from Botsplash's comprehensive reporting dashboard.

Within Rate's account and its subaccounts, **a total of 1,080 meetings have been booked YTD**.

This highlights the Botsplash platform's pivotal role in facilitating client interactions and appointments across the organization. Furthermore, metrics such as the response rate and total messages sent and received offer valuable insights into client engagement levels.

Owning yielded a **40% response rate and 1.9K total messages exchanged YTD**.

These numbers demonstrate active communication and client interaction.

Guaranteed Rate Affinity also showcases a **35% response rate and a low spam rate of .54% YTD**

These numbers indicate successful client engagement and minimal disruption due to spam. These metrics collectively provide a comprehensive understanding of how Bookme contributes to streamlining operations and fostering productive client relationships within Rate's multi-faceted business framework.

Additionally, Rate's average response time per conversation has **dropped to less than a minute**

Indicating the impact that Botsplash has made to streamline the communication process by eliminating multi-platform management, which redirects the agents focus on the client.

IN CONCLUSION

The integration of Bookme and subaccounts within Rate's operational framework marks a profound transformation in the company's organizational communication and sales processes. Bookme's intuitive scheduling capabilities have streamlined appointment booking for both agents and clients, enhancing productivity and customer satisfaction. Additionally, subaccounts have empowered different segments of Rate's organization to operate independently while maintaining brand consistency, fostering agility and adaptability. Together, these features have revolutionized how Rate engages with clients, enabling a more personalized and seamless experience throughout the sales journey.

LEARN MORE ABOUT BOTSPLASH

Botsplash is an omnichannel consumer engagement platform that combines messaging channels such as SMS, web chat, Facebook Messenger, Google's Business Messages, and more onto one unified SaaS-based dashboard. Our users are able to conduct effective inbound and outbound messaging campaigns using numerous integrations, features, and more. Botsplash takes a human-first approach and lets the real interactions inform how and when to use automation and AI. Our clients range from small to enterprise size and we offer solutions for a range of industries.

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