



CASE STUDY

VanDyk Mortgage Gains and Retains More Borrowers Thanks to Customer Intelligence and Data-rich Customer Profiles



With 90 branch offices and more than 200 loan officers across 43 U.S. states, VanDyk Mortgage has closed more than 120,000 mortgage loans in the last 30 years by providing borrowers with an exceptional customer experience.



At a Glance

The Situation

The marketing team at VanDyk knew that opportunities were being missed to build realtor relationships and engage with past borrowers to be their lender of choice for future needs.

The Solution

A purpose-built customer engagement platform that marries sales productivity, marketing automation, compliance and customer intelligence that integrates with existing loan origination and digital mortgage technology systems.

The Success

- Higher customer retention
- Personalized, automated prospect/borrower marketing
- Unified hub for tech integrations
- Complete customer profile connected to automated Journeys customer data across tech systems

“With Total Expert, we can finally forge a true partnership between our Sales and Marketing teams by focusing and relying on data and insights, we can build marketing strategies that lead to predictable business growth.

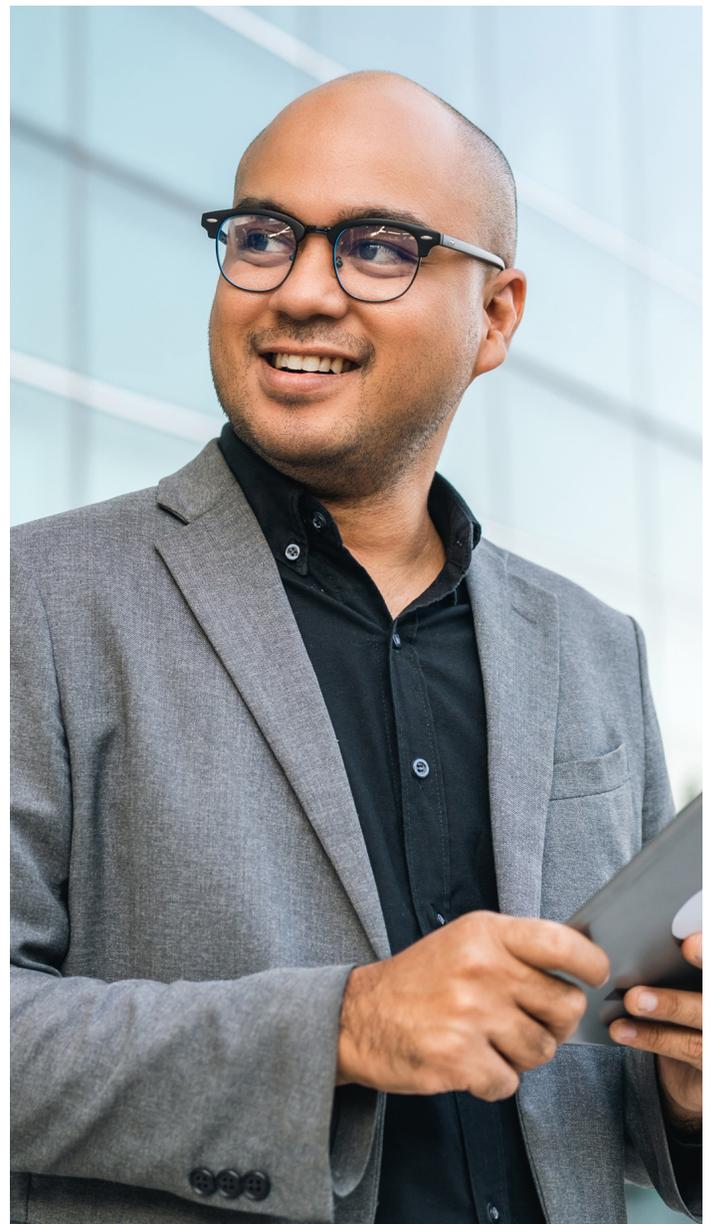
Shannon Schmidt
Chief Marketing Officer

The Situation

Only a modern marketing technology architecture could help VanDyk Mortgage deliver the consistent, differentiating customer experience to which its leaders aspired. But in early 2022, the retail lender’s Marketing team —relied upon manual, realtor-focused marketing techniques and outdated technology that included a stagnant, eight-year-old CRM system and Excel-based sales alerts from a point-solution data provider.

This legacy approach wasn’t modern by any stretch of the imagination. And it certainly wasn’t helping the lender build better realtor relationships and encourage more past borrowers to come to VanDyk when they needed new home loans. Their previous CRM couldn’t give VanDyk marketers the important, data-driven insights they needed to develop more effective campaigns. It only offered basic, drip nurture functionality — it couldn’t automate key processes using sophisticated ‘if-this-then-that’ scenarios. And, to make matters even worse, whenever VanDyk needed help from the customer support team, it seemed the right resources could never resolve the lender’s issues quickly or completely.

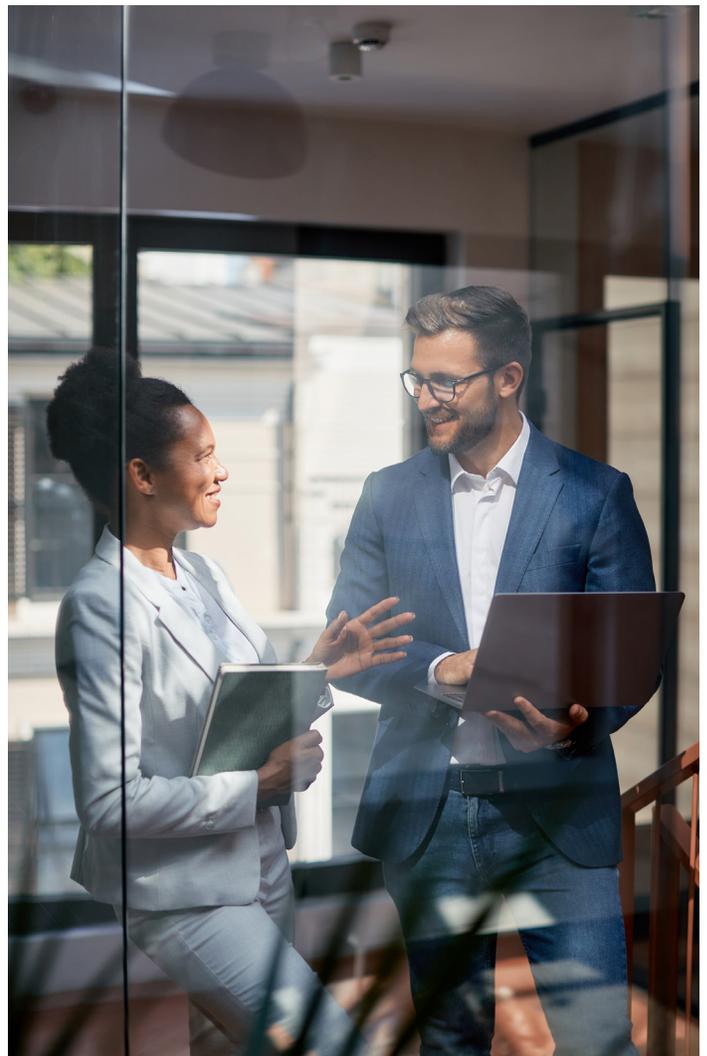
What VanDyk needed was an innovative, financial services-focused customer engagement platform that would empower its team to directly engage in better, more effective ways with existing borrowers, so loan originators and Marketing wouldn’t have to constantly source new opportunities.



The Solution

VanDyk selected Total Expert's customer engagement and customer intelligence solutions which seamlessly integrated with its existing Encompass and Black Knight loan origination systems and with point-of-sale system, Simple Nexus.

Now, the Total Expert platform unifies data from multiple different technology systems and provides a single, comprehensive customer profile of sales and marketing activity, and other important customer behavioral data. Its automated alerts notify the right VanDyk loan officers and marketers when a new or existing client behaves in a way that signals potential interest in another mortgage or refinance loan purchase (like by having their credit pulled). And Total Expert Journeys enable loan officers to deliver automated, personalized, multi-channel campaigns to prospects without Marketing having to manually build each one.



“Since Total Expert is purpose-built for the mortgage and lending market, even its basic capabilities set it apart from any other option out there. But Total Expert also integrates easily with other important software we use daily, like loan origination systems. And when it comes to customer support, the Total Expert team is top-notch — true experts available to us whenever we need them.”

Shannon Schmidt
Chief Marketing Officer

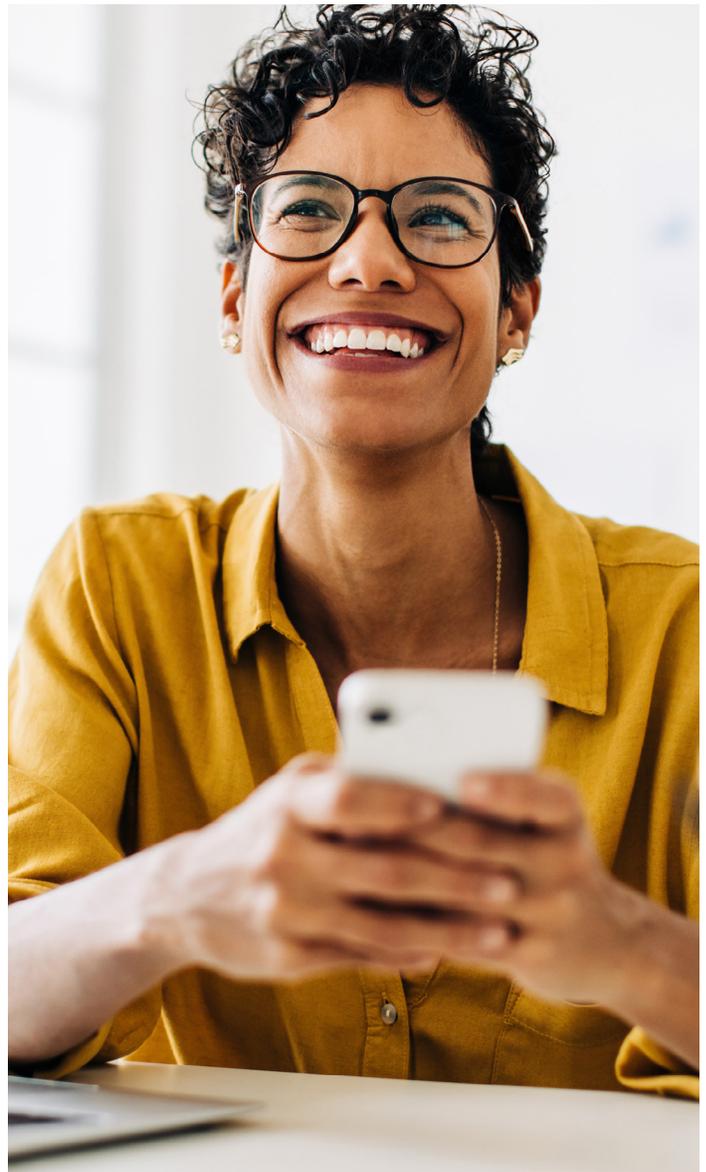
“Customers expect personalization — they expect you to know a little bit about them and where they are in their life journey. When you can match that up with data and meet them where they are, with the right message, it helps them feel like you know who they are and reinforces your relationship with them.”

Shannon Schmidt
Chief Marketing Officer

The Success

VanDyk’s loan officers and Marketing team credit Total Expert with giving them the data, insights and automations they need to more consistently, effectively and efficiently engage VanDyk’s existing clients to come back for their next loan. Total Expert-powered Journeys, for instance, generated \$11M in net new loan applications in just 6 months for their loan origination team.

Total Expert is also helping VanDyk’s CMO accomplish one other important goal: shifting the focus of her team—building a scalable marketing platform that doesn’t rely on customization for each sales team member. This approach helps move all sales opportunities forward instead of supporting them one by one.





About Total Expert

Total Expert is the leading fintech software company that delivers a purpose-built customer engagement platform for modern financial institutions. Total Expert unifies data, marketing, sales, and compliance solutions to provide a cohesive experience across the customer lifecycle. Total Expert turns customer insights into actions to increase loyalty and drive growth for banks, lenders, credit unions, and other financial services firms.