



**ZILLOW<sup>®</sup>GROUP**

**Handling More Borrower Contact  
Volume Through Automation**

So, you've increased your borrower contact volume. That's a good thing, right? It can be a great thing for your business, but only if you find a way to manage those additional contacts while continuing to provide the level of service that your customers expect.

Even with the uptick in business, your main focus should be providing a great experience for your customers, not managing and scaling up your business processes. This is where automation tools come in handy. Automation tools offer numerous ways to improve the customer experience and help maintain your closing rate.

## Save time with outbound dialing

Automation systems can keep you and your team productive by reducing the hassle of calling prospective clients. Together with an auto-dialer, you can filter out bad phone numbers, dial phone numbers with the click of a button and create automated voicemails to leave when the contact doesn't answer their phone. Most auto-dialer systems also offer a way to add notes on every call you make, so you can continue to keep the customer's needs at the top of your priorities, including information about their budget, loan type, timeline and more.

## Continue responding quickly to contacts

The faster you respond to a new contact, the more likely they are to become a client. By incorporating automation into your initial response workflow, you'll be able to set up customized automatic responses to tell new contacts that you've received their message and will get back to them as soon as possible. Timely responses will help your contact will feel confident that you're approachable and timely.

## Keep in touch with contacts before the loan closes

With an automation system, you can add leads to prewritten drip campaigns. Drip campaigns are a great way to keep yourself relevant with a contact, even if that person is weeks, months or even years away from becoming an active client.

Automation systems can automatically deliver messages at preset intervals of time and keep leads engaged while you're busy working with your current roster of clients. Most systems come with a selection of ready-made drip campaigns, but you can also customize campaigns to speak to a specific demographic or interest group, like first-time homebuyers or contacts who are exploring their refinancing options.



## Provide valuable content for your contacts

Not only is it important to keep in touch with contacts before the loan closes, but you also need to provide well-timed, valuable information that shows clients you'll be an asset if they decide to go forward and do business with you.

Luckily, automation systems allow you to send real-time rate updates to prospective borrowers based on a spike or dip in rates. All you have to do is set the thresholds that are of interest to the contact. Additionally, these rate updates can be segmented based on loan type, so they can be sure that they're getting the most personalized information possible.

## Stay in touch with borrowers after the loan has closed

Your work isn't done when your clients have signed on the dotted line! The most successful lenders know that referrals and repeat customers are the keys to a steady stream of business. Many lenders forget to keep in touch with past clients or don't feel like they have the time to follow up individually. But, with an automation system, you can put past clients on a specific drip campaign that keeps you top of mind the next time they're ready to buy again or refinance, or whenever someone asks them for a referral.

These campaigns don't have to be set around uneventful time periods; take the opportunity to personalize your campaign efforts and congratulate your customers on their home purchase anniversary and send holiday greetings.

## Automation on a budget

If you're on a budget, automation can seem like an unattainable goal; while the depth and breadth of features available on robust automation systems will not be available to you, there are still automation opportunities. The key is to stay organized. Create a calendar, and every time you get a new contact in your pipeline or close a loan, create a timeline for them through calendar notifications.

Moreover, create email and call or text message templates for various milestones throughout the loan process — all the way from initial contact to years after the loan has closed. Even if you have to manually send the emails, the step of creating fresh content every time can be eliminated through a simple planning process.

There are many systems available in today's market. Some are more robust and more expensive than others, but they all serve the same purpose: They eliminate the headache of manual processes and keep customer service at the forefront of your business. Automation is only half of the battle. Never forget to provide a great customer experience to your contacts and customers!