Top Flite Financial SMS Case Study

Executive Summary

Top Flite Financial's (TFF) Consumer Direct Division works with clients nationwide with a heavy focus on cash/out debt consolidation refinance transactions. They work with several of the major lead aggregators to provide real-time internet leads and live transfers to their loan officers.

THE PROBLEM

Before implementing the Botsplash platform into their processes, the TFF team could not find an effective SMS communication solution. The challenge stemmed from CRM shortcomings when it came to lead distribution and a lack of necessary quick-help features.

Botsplash provided TFF the opportunity to truly transition from a multi-platform approach to an omni-channel strategy.

SOLUTIONS

REPORTING & FEATURES

Botsplash's real-time reporting gave Top Flite Financial the ability to make strategic SMS campaign decisions. Additionally, the Botsplash platform allowed TFF to pick up new features previously not available to them through their legacy systems. **TFF has experienced a 30-40% lift in its deliverability rate bringing it to 98% deliverable.**

LEAD DISTRIBUTION

Pre-Implementation, TFF's systems could not trigger automated conversations during off-peak hours resulting in a loss of profit and diluted customer satisfaction. **Top Flite Financial saw a 17% increase in contact ratios for leads purchased off-peak. Additionally, OVERALL contact ratios are up 10%.**

INTEGRATION PROCESS

Botsplash makes every effort to ensure integration is timely and efficient with a typical goal of **LESS THAN TWO WEEKS**. **Botsplash successfully integrated TFF's proprietary CRM and Velocify system into one turn-key solution, providing a unified experience for the first time.**

END RESULTS

In less than a year, Botsplash increased TFFs contact ratios and validated the need for a comprehensive omni-channel and SMS strategy. The use of Botsplash's reporting system, added features, and mobile application has enabled TFF to increase revenue, improve client satisfaction, and build agent morale.

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