

2021



# HOW BOTSPLASH TOOK **TOP FLITE** **FINANCIAL'S** SMS STRATEGY TO **NEW HEIGHTS**



CLIENT  
SPOTLIGHT

# Table of Contents

---

<a href="#"><u>Who is Top Flite Financial?</u></a> .....	3
<a href="#"><u>The Problem</u></a> .....	4
<a href="#"><u>Integration Process</u></a> .....	5
<a href="#"><u>Loan Officer Experience</u></a> .....	6
<a href="#"><u>Lead Distribution</u></a> .....	7
<a href="#"><u>Reporting &amp; Features</u></a> .....	8
<a href="#"><u>Conclusion</u></a> .....	9
<a href="#"><u>Learn More</u></a> .....	10

## Who is Top Flite Financial?

Top Flite Financial's 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.

*Top Flite Financial offers the following loan products to its customers:*

- FHA LOANS
- FIRST TIME HOME BUYER MORTGAGE
- FIXED-RATE MORTGAGE
- HARP LOANS
- HOME EQUITY LOANS
- JUMBO MORTGAGE LOANS
- PURCHASE LOANS
- REFINANCING
- REVERSE MORTGAGE LOANS
- USDA LOANS
- VA LOANS



### "Top Flite Financial Loves Botsplash"

"The Botsplash team is top-notch. They are very involved and the implementation was very well executed. We really enjoy working with them and we continue to find new opportunities to increase ROI and engagement."



————— Todd F. —————

## The Problem



**Ninety-Five Percent (95%) of text messages are read and responded to within three minutes of being received.**

However, many companies still haven't adopted an SMS texting strategy when trying to reach prospective clients. **Despite statistics, sixty-five percent (65%) of brands still don't have a formal strategy in place for bulk SMS messaging.** Top Flite Financial's number one priority is making the mortgage process as painless as possible all while providing the most advanced products and service technologies available. **Recognizing that the vast majority of customers text daily, the TFF team decided to include SMS as part of their marketing plan.**



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. **While their CRMs didn't offer these features, the TFF team understood that if they didn't use SMS to engage with prospects, high-intent customers would be lost from their funnel.**

Furthermore, an efficient and accurate reporting system was missing. Post-implementation, Botsplash added lead routing, lead distribution, and a new lead management system.

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

## Integration Process

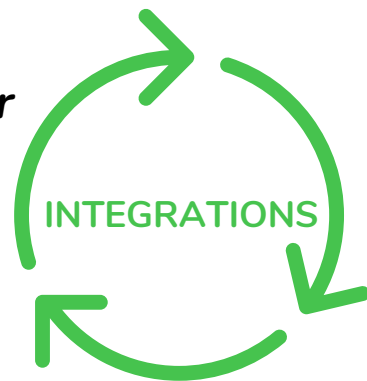
Compounding the challenge, TFF utilizes two CRMs to help with its workflow. Top Flite Financial uses a **proprietary CRM** called "Hotlist" which is used primarily by the Operations team, as well as the widely used "Velocify" system that is used exclusively by the Sales team.

**Botsplash's team successfully integrated TFF's proprietary CRM and Velocify system into one turn-key solution, providing a unified experience for the first time.**

The Top Flite Financial team noted that the integration process was seamless, efficient and relieved their worries as Botsplash's customer success team strongly focused on minimizing downtime during the transition.

**Botsplash makes every effort to ensure integration is timely and efficient with a typical goal of **LESS THAN TWO WEEKS.****

*See some of  
our other*



**Velocify**<sup>™</sup>

salesforce

**G Suite**

**NICE** inContact

## Loan Officer Experience

Approval from Top Flite Financial's Loan Officers has been overwhelming. Because the Botsplash platform is available via mobile app and desktop, LOs now have the ability to monitor and organize conversations wherever they are, at any time.

➔ As a result, Top Flite Financial saw an uptick in capacity and after-hours correspondence which has led to

**MORE CLOSED DEALS**



Currently, Top Flite Financial's customer conversations are responded to **IN SECONDS** when they were frequently overlooked before Botsplash adoption, due to lack of immediate access to the platform.

"Customer retention and overall customer experience has seen a substantial lift as a result of having the ability to answer or continue conversations using Botsplash's mobile application."

**-Division Manager, Top Flite Financial**



## COMPLIANCE TEAM APPROVAL

As an added bonus, TFF's compliance team appreciates that all communication channels are in one place. The compliance team also supports Botsplash's canned message feature allowing pre-approved comments that can be selected for fast and efficient responses to commonly asked questions.

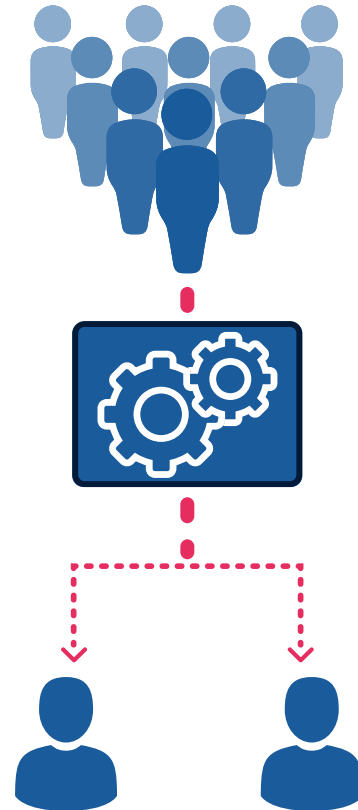
## Lead Distribution

Traditionally, most lead assignment and distribution strategies follow a round-robin approach where the system designates leads to the next agent in line. Unfortunately, such a system has flaws. An agent may show themselves as available, so as not to miss a lead, but is preoccupied with other prospects, may be on break, or is away from their desk. This leads to customers' wait times increasing and agents unaware of a person needing assistance.

Distribution strategies like these can be effective for asynchronous/offline engagements such as email follow-ups, outbound calls, support ticket processing, and more. However, engagement that requires time-sensitive responses demands a smarter distribution strategy.

*The Botsplash platform actively checks which agent is online, measures response time, and examines filters based on availability for chat vs. call. Benefits include:*

- ▶ **The most efficient response time for the customer**
- ▶ **The elimination of round-robin lead distribution**
- ▶ **The ability for an agent to take a conversation based on availability**



The Botsplash platform also provides lead distribution during off-peak hours. Prior to implementation, Top Flite Financials systems could not trigger automated conversations during off-peak hours resulting in a loss of profit and diluted customer satisfaction.

**Top Flight Financial Has Seen A**

**17% INCREASE IN CONTACT RATIOS  
FOR LEADS PURCHASED OFF-PEAK**

**ADDITIONALLY**

**OVERALL contact ratios are up to 10%**

## Reporting & Features

Botsplash's real-time reporting gave Top Flite Financial the ability to make strategic SMS campaign decisions. The newly adopted reporting structure allowed TFF to not only measure performance in detail but also made it possible to make adjustments on the fly. **Additionally**, the Botsplash platform allowed TFF to pick up new features previously not available to them through their legacy systems.

*TFF reported the following benefits post-implementation:*

### ▶ The Ability to Track Real-Time Deliverability

- TFF can now see what messages have been flagged allowing it to immediately update- **this has increased the deliverability rate to 98%**
- TFF has experienced a **30-40% lift in deliverability** from what it received with its CRMs prior to the Botsplash integration

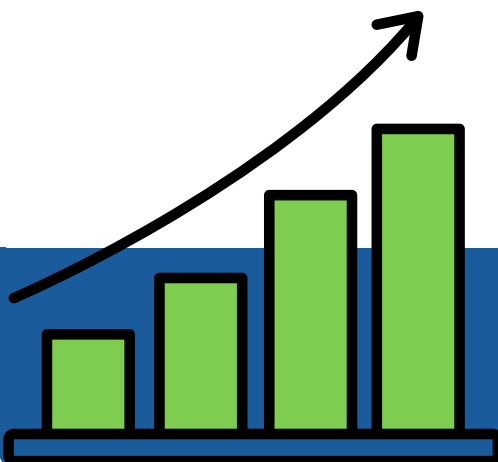
### ▶ Documents Can Now Be Sent In Messages

### ▶ Added Canned Message Functionality

### ▶ Added Scheduled Send Functionality

### ▶ Mobile App Compatibility

### ▶ Group Chat Capability





## Conclusion

Before Botsplash, Top Flite Financial had difficulty finding an effective omni-channel solution that included SMS. *The Michigan-based lender's main obstacles included:*

- ▶ **Lead distribution problems**
- ▶ **Inadequate SMS delivery rates**
- ▶ **Low engagement from new leads**
- ▶ **The absence of an accurate reporting dashboard**
- ▶ **A lack of important features such as canned messages, scheduled send, document sharing, mobile app compatibility, group chats, and more**

### Post-Implementation

Post-implementation, Botsplash was able to address the mentioned issues and more. Top Flite Financial reported a **17% increase in contact ratios for leads purchased off peak hours and an increase in deliverability of over 30%**. While TFF's prior process didn't include a way to tie in its CRM systems, **Botsplash was able to dually implement both a proprietary CRM and their Velocify system into a single effective solution.**

Additionally, real-time reporting was made available after integration which has allowed TFF to track, measure, and increase their SMS deliverability. According to the Division Manager at Top Flite Financial, their messages are now more than **98% deliverable** and they are seeing a **30-40% increase in lift from what they were experiencing before Botsplash.**

Agent usage has expanded to utilizing the Botsplash mobile app, enabling conversations to continue in real-time or through scheduled send. And the Top Flite Financial compliance team is confident messaging to consumers is consistent and compliant. Satisfaction levels are high from agents and compliance to the customers themselves.

## Results

In less than a year, Botsplash increased Top Flite Financial's 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.

# We Would Love to Hear From You!


We hope you enjoyed learning about Top Flite Financial's experience with Botsplash. If you believe this solution is something that would benefit your digital strategy, please contact us! We will work closely with you and your business to determine if Botsplash is a good fit for your communication requirements. Also, don't forget to follow us on all social media outlets to stay up to date with the latest content and news from Botsplash.




**Feel free to click here to schedule a no-obligation demonstration of our platform.**

### Other Botsplash Solutions:


At Botsplash, we offer an array of helpful solutions and customizable self-help options. Our platform is easy to use, consists of state-of-the-art features and can be adopted by companies in numerous industries. **We offer the following additional chat options:**




**Web Chat**



**Voice & Video Calling**



**Facebook Messenger**



**Google Business Messages**



hello@botsplash.com

www.botsplash.com