



# THE GAME CHANGER

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VanDyk Mortgage Pairs Sales  
Boomerang with Surefire CRM to  
Capture Refi Opportunities and Improve  
Customer Retention



## ABOUT VANDYK MORTGAGE

Founded in 1987, VanDyk Mortgage Corporation (VanDyk Mortgage) is a private direct lender that has provided residential home loans to clients for over 30 years.

With over 500 employees, including 251 licensed retail mortgage advisors, VanDyk Mortgage creates lifelong relationships with clients in more than 90 branch offices nationwide. VanDyk Mortgage understands the importance of each individual loan, and its team of expert mortgage advisors works closely with each client to fit them with the best loan for their needs.

# OPPORTUNITY KNOCKED



While VanDyk Mortgage has focused primarily on purchase business for most of its lifespan, the record-low mortgage interest rates of 2020 created undeniable potential in the refinance market. The company quickly began looking for the best business intelligence solution to help identify refinance opportunities within VanDyk's existing database.

"VanDyk Mortgage has closed over 120,000 mortgage loans, so we have more than enough potential refi leads in our database," explains National Director of Strategic Growth Steve Richman. "The main challenge was finding a digital solution that could sift through all of that customer data and systemize it to help us identify opportunities we might be missing."

## THE SOLUTION WAS CLEAR

Part of Sales Boomerang, LLC, Sales Boomerang is an automated borrower intelligence and retention system that monitors lenders' customer databases to identify the most promising loan opportunities.

Lenders can choose from 11 different loan opportunity alerts, from "defensive" alerts that trigger when a borrower takes an action – such as applying for a mortgage with another lender, paying off a loan early or listing their home for sale – to "offensive" alerts that enable originators to present opportunities to borrowers once they meet certain criteria, such as attaining a target loan-to-value (LTV) ratio or credit score. Within months of implementing Sales Boomerang, lenders see an average 20–40% lift to loan volume and increase their borrower retention by an average of 65% or more.

Sales Boomerang's track record of success caught the eye of VanDyk Mortgage leadership, who assigned Richman to manage the company-wide rollout of Sales Boomerang.

**"We want to maintain lasting relationships with our customers, but it's not feasible for a single mortgage advisor to keep tabs on every client on their own," says Richman. "We chose Sales Boomerang as a way to shake the tree a little bit and identify past customers that should be prioritized without putting a huge strain on our originators."**

In the summer of 2021, VanDyk Mortgage began piloting Sales Boomerang's Mortgage Inquiry Alert, which lets lenders know within 24 hours when their prospects are shopping with a competitor.

**"The automated alerts are a game-changer," says Richman. "They are helpful for identifying purchase loans, an area at which we excel. And because they also trigger when somebody is looking to refinance, they opened a whole new world of loan opportunities for us."**

First, Richman enrolled VanDyk Mortgage's entire database of past customers and prospects – nearly 92,000 contacts in all – in Sales Boomerang's Mortgage Inquiry monitoring. Next, he enabled Sales Boomerang's out-of-the-box integration with Black Knight, Inc.'s customer relationship management platform, Surefire. Part of Black Knight, Inc. (NYSE: BKI), Surefire is an award-winning provider of marketing automation and creative content solutions.

Through the integration, every new contact created in Surefire is automatically shared with Sales Boomerang to ensure prompt enrollment in Mortgage Inquiry monitoring. Surefire automatically notifies mortgage advisors and referral partners each time an assigned contact triggers a Sales Boomerang alert. In addition, Surefire's automated workflows can be configured to use Sales Boomerang alerts as the jumping-off point for a cascade of context-specific marketing communication delivered across multiple channels including email, text and video.

**"Sales Boomerang and Surefire work hand-in-hand. We get the notification from Sales Boomerang that a customer is ready for a loan, and then it's a one-two punch. Surefire reaches out to them without us needing to lift a finger," Richman says.**

# RESULTS THAT SPEAK FOR THEMSELVES



Together, Sales Boomerang and Surefire are helping VanDyk Mortgage grow its refi business and improve customer retention by making timely connections with high-intent borrowers. Just six months post-implementation, VanDyk Mortgage has already seen measurable results:



## BETTER-INFORMED MORTGAGE ADVISORS

When used in conjunction with a CRM like Surefire, Sales Boomerang automatically alerts originators when an assigned contact triggers an alert. In addition, Sales Boomerang provides a history of each contact's past triggered alerts. Together with the customer details and records of prior communication stored in Surefire, this information makes it easy for mortgage advisors to make a meaningful, value-adding connection every time they reach out to a past customer or prospect.

This context is especially valuable for junior producers, who gain confidence from knowing they are reaching out to a customer who is in the market for a loan today – not just another cold lead.



## AUTOMATION-ASSISTED PRODUCTIVITY

Once a mortgage advisor has been in business for a few years and amassed a large database of contacts, it becomes difficult to find the time to reach out to every contact on a routine basis. The combination of Sales Boomerang and Surefire solves this problem, allowing mortgage advisors to reach more customers every week – and, more importantly, enabling them to prioritize the right customers.

**"If you've got a ton of alerts coming in, it can be more than your mortgage advisors can deal with all on their own," says Richman. "Using Sales Boomerang to prioritize which customers to reach out to and add context to the personal outreach from Surefire has proven especially useful in a busy year of refs like we had this past year."**

**"Our mortgage advisors especially love Surefire's Power Videos. They are simple to use and an effective way to show past borrowers that we're still with them," Richman adds. "It's integrated right into Surefire CRM, so we can deploy personalized outreach videos at any point in the loan lifecycle with just the click of a button."**

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**"Sale's Boomerang's No Borrower Left Behind mission aligns perfectly with our culture at VanDyk Mortgage," concludes Richman. "We look forward to introducing additional Sales Boomerang alerts to help even more borrowers find the perfect loan for them."**

## **FAST-TRACK TO ROI**

On average, mortgage lenders achieve customer retention rates of 1.4–5.3 times the industry average and experience a 20–40% lift to loan volume after implementing Sales Boomerang.

In its first six months of using Sales Boomerang, VanDyk Mortgage received Mortgage Inquiry alerts for 3,375 customers or past prospects (approximately 3.7% of its 91,910 monitored contacts) who were actively shopping for a mortgage loan. Together, these high-potential loan opportunities represented \$843 million in potential loan volume that would otherwise have been overlooked.

**"2020 was our largest year, and we are on track to match it by the end of 2021. Not many lenders can say that, and it's all thanks to Sales Boomerang."**



Using Sales Boomerang in combination with Surefire has made VanDyk Mortgage's expansion into the refinance market a smooth one, giving mortgage advisors more opportunities and time to serve our customers with the best possible loan experience. For nearly 35 years VanDyk has been dedicated to treating its customers like family. Sales Boomerang has helped the VanDyk team further this mission while improving borrower retention and filling pipelines with quality leads.

## **NO STRINGS. JUST A CONVERSATION.**

Questions? Let us answer your questions. We'd love to show you how our No Borrower Left Behind® philosophy is the most effective way to retain your borrowers, increase loan volume, and lower your cost per closed loan.

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