

upland InGenius

InGenius and Salesforce Omni-Channel
Improve Agent Productivity For
United Wholesale Mortgage



INDUSTRY: FINANCE **SIZE:** 2000+ EMPLOYEES **LOCATION:** PONTIAC, MI

KEY IMPACTS:

- 50% increase in cases handled per day
- 23% increase in NPS score

SUMMARY

Since implementing Upland InGenius blended agent with Salesforce Omni-Channel, the United Wholesale Mortgage (UWM) client services team has increased their agent productivity by 50% and improved customer satisfaction by 23% - an important achievement for a company who prides itself on ensuring their clients enjoy doing business with them.

THE CHALLENGE

REPORTING

United Wholesale Mortgage was rapidly growing and knew their current system of each account executive writing down call and chat details on legal notepads wasn't sustainable. They were looking for a way to see what their salespeople were doing, and to track what their clients wanted and cared about in a searchable way.

PRODUCTIVITY

The UWM client services teams were previously divided out into phone teams, case teams and chat teams. This proved to be highly inefficient because the demand on each platform wasn't equal, so UWM was also looking to improve their agents' productivity and improve response time, no matter the contact channel.

BACKGROUND

United Wholesale Mortgage is a leading wholesale lender in the United States. They focus on providing a good experience to their clients by following through on their word, being open and transparent throughout the loan process, and creating meaningful relationships. The UWM team works with financial institutions, correspondents and brokers. Every day, employees come into work and not only put their best foot forward, but have a passion for listening to what their clients have to say. The company is grounded in a commitment to servicing their clients.

THE UPLAND INGENIUS SOLUTION

United Wholesale Mortgage integrated InGenius Connector Enterprise with Salesforce Omni-Channel to enable a blending of voice and case channels. This blended agent integration brought their 53 agents into one holistic blended agent team that manages all cases.

"Implementing InGenius was smooth and simple. It wasn't a lot of effort to have such a huge impact on our organization."

Justin Glass | Chief Digital Officer | United Wholesale Mortgage

Before using InGenius, notes at UWM were handwritten and hard to find. Now with InGenius blended agent, every call, chat or case is tracked and managed in the InGenius user interface within Salesforce. This gives client services and account executives one pane of glass to work from, and a way to track each interaction.

With previous notes and records all in one place, every UWM rep has each client's situation and history at their fingertips, no matter how the client chooses to communicate.

Using InGenius blended agent and Salesforce Omni-Channel, UWM's customers can expect excellent service and a consistent experience. They have shorter wait times and don't need to spend time repeating their information or issue, whether they are transferred to another rep or contacting UWM consecutive times.

KEY RESULTS

With InGenius blended agent and Salesforce Omni-Channel, United Wholesale Mortgage agents handled 50% more cases per day and improved their Net Promotor Score (NPS) by 23% after deploying a blended agent solution.

INCREASED AGENT EFFICIENCY

United Wholesale Mortgage uses InGenius to make it easy for their client services teams to create and access client records so they're always providing the best service. InGenius blended agent and Salesforce Omni-Channel allow each UWM agent to handle a combination of calls, chats and cases. This has resulted in UWM agents managing up to 35 total cases per day, a 50% increase from their previous maximum.

"We originally started with our service teams split out, and we found it very inefficient. InGenius and Omni-Channel brought that together into one holistic team that can manage all the parts."

The InGenius and Salesforce integration has proven so effective for UWM that they have been able to provide a faster service level agreement (SLA) for case resolution. Before InGenius blended agent was implemented, 30% of cases would fall outside of a 3-hour SLA, and it would sometimes be a struggle to reach a solution within 1 day. Now, employees return a non-automated response to the client within 1 hour and resolve the case within a maximum of 3 – with 100% success.

"Moving to InGenius and Salesforce Omni-Channel integration has allowed us to hit our 3-hour SLA 100% of the time. Previously it would take almost a full day!"

IMPROVED BUSINESS OFFERINGS

The UWM teams also use call wrap-up codes to track and categorize calls, giving them the information they need to run monthly reports and see what pain points need to be addressed. By tracking the types of calls they were receiving, UWM found that they got 600 calls a month for a specific term in their mortgage agreements. After listening to their customers and implementing changes to the agreement, they find now they now only get 20 calls per month on that specific term – a 97% decrease. Tracking calls has allowed UWM to simultaneously drive down call handling time, while keeping more customers happy. Now that this data is all tracked in Salesforce, it's easy for them to decide what to focus on and adapt to better serve their clients.

EXCEPTIONAL CUSTOMER SERVICE

With the implementation of InGenius, United Wholesale Mortgage now has an easily accessible record of each of their clients and previous interactions that they can draw upon. Computer telephony integration (CTI) features such as screen pop help employees start each conversation warmly, without having to search for details. This warm start is essential to UWM achieving their goal of creating meaningful relationships with their clients. Thanks to these improvements, in the past 2 years, UWM has seen an increase of 23% in their NPS score.

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