CALIBER HOME LOANS

Customer Overview

Industry: Financial Services
Company Size: Enterprise

Products

Salesforce CRM
Salesforce Lightning
Salesforce Service Cloud
Informatica
Aspect CTI
Telephony

Key Differentiator

ArganoKeste specializes in solutions that transform customer support centers into impactful revenue centers.

Challenge

National mortgage lender's archaic systems were putting them at a disadvantage in a highly-competitive industry. Key challenges include:

- Disjointed systems enabled data gaps with multiple lead generation pipelines (builders, third-party networks, etc.), creating duplicate and erroneous data
- Lack of data governance and error-ridden processes led to frustrated, misinformed loan officers and lost opportunities
- Sales cycle relied heavily on direct customer interactions and slow manual processes, limiting revenue growth

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Solution

ArganoKeste implemented a modern customer support solution to improve lead conversion and loan officer productivity. Solution included:

- An upgraded customer relationship management (CRM) system to automate lead sorting and loan officer assignments
- Integrations between Salesforce, external lead generation pipelines and phone system to improve data quality and reporting capabilities for better decision making
- A guided phone system to automatically direct calls and provide loan officers with real-time customer dashboards, decreasing call time and enabling scale
- Automated processes dramatically reduced errors and customer response time, improving customer experience and converting more leads