

Aligning Sales and Marketing with Personal Marketing Center®



Empower Loan Officers with Customizable, Compliant and Multi-Channel Assets

A mortgage company offers more than just a way to buy a home. They offer a journey to homeownership for their customers, and that journey relies on scaled marketing communication for every step of the way. But scaling personalized marketing and keeping it on-brand and compliant was a challenge for one of PFL's large mortgage customers. They turned to PFL's Personal Marketing Center (PMC) to house customizable direct mail and digital assets within Salesforce, making their efforts scaleable, trackable and personalizable, all while staying on brand.

THE CHALLENGE

- **Too many one-off requests from loan officers**
- **Struggles maintaining compliance across distributed loan officers**
- **Challenges managing multi-channel outreach**
- **Limited visibility into content performance**
- **Point solutions slowing down adoption of Salesforce**

The mortgage company focuses on building lifelong relationships with its customers, which means ensuring that clients receive thorough, personalized communication through every step of the loan process to help them make the financial decisions for their needs. But supporting this mission was no easy task for both the loan officers and corporate marketing.

The marketing team struggled with sales enablement. Their loan officers frequently submitted requests for customized marketing materials, or went rogue and created their own.

The marketing team was spending too much time managing these requests, and not enough time creating new content and addressing other marketing initiatives. The team was also concerned about compliance risks.

"Each time we found out a loan officer had created their own content, our hearts froze in worry about compliance," said the company's Database Marketing Manager. "In our industry, we have to be so careful about compliance and the fine print. This isn't always top of mind for our loan officers."

Furthermore, the marketing team had no visibility into how their content performed and how effective their loan officers' efforts truly were. The marketing team was responsible for managing data across Salesforce, Marketing Cloud, and many other channels.

Our loan officers rely heavily on multi-channel outreach. We were dealing with messy importing and exporting of data to make this happen and had limited visibility into outreach effectiveness.

Their manual process of creating customized content and getting it delivered to the right person was wreaking havoc on the customer experience. "It was almost impossible for our personalized resources to be delivered to the customer in a timely way," the Database Marketing Manager said.

THE SOLUTION

A partnership with PFL's PMC® solution allows the mortgage company to make it easy for their loan officers to access all of their marketing materials – from emails, nurture stream campaigns, and print collateral – without ever leaving Salesforce. Some aspects of their collaboration with Salesforce and PFL include:

On-demand collateral

With the Salesforce Marketing Cloud integration, reps can send marketing emails and add contacts to automated marketing campaigns. Email and direct mail send data and attribution lives within Salesforce, providing a 360 view into the customer and asset performance.

Data integration and transparency

There is now clarity and understanding between departments and marketing channels, which brings in a focused sense of revenue contribution and helps save time and resources.

Brand and regulatory compliance

Smart templates drive the assets, allowing extreme personalization while maintaining brand compliance.

Improved sales efficiency

Point solutions were removed and now loan officers don't have to leave Salesforce to access cross-channel marketing materials. Loan officers spend less time executing marketing and can even have support staff send assets on their behalf.

LOAN OFFICERS CAN:

- **Compliantly customize assets and add contacts to curated content streams**
- **Access all marketing collateral in one place.**
- **Leverage multiple channels for maximum results**
- **Do all of the above within Salesforce**

STOP THROWING YOUR HARD-EARNED MONEY OUT THE DOOR!

Renting is not investing. You know that. But do you know how much you're really paying your landlord over time? Look at the chart below.

Monthly Rent	Payments After 15 Yrs	Payments After 30 Yrs
\$1,000	\$180,000	\$360,000
\$1,500	\$270,000	\$540,000
\$2,000	\$360,000	\$720,000
\$3,000	\$540,000	\$1,080,000

Isn't it time to put YOUR money to work for you and seek the benefits of homeownership? There are a variety of loan options with little or no down payment required to help you get into a new home. To find out if you qualify and to learn more about putting your money to work for you, contact me today!

It's time to save your hard-earned money and start building equity in a home for a brighter and more financially sound future.

Firstname1 Lastname1
Phone1
email1
email2
cell
address1

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PMC makes Salesforce a place where loan officers can do their business - not just manage contacts.



ABOUT PFL

PFL specializes in tactile marketing, truly personalized and triggered direct mail programs that deliver a tangible competitive advantage. For more than 20 years we've served leading sales and marketing organizations around the globe, providing sales enablement and marketing automation solutions, as well as printing, mailing and fulfillment services.