

Case Study: Peoples Bank

“We tested the InSellerate technology at one branch location and increased our conversion rate from 7.7% to 10.25% in just nine months. That’s a 33% increase without investing any more in advertising or the sales team. We’d call that a success.”

Jim Lind, President
Peoples Bank, Mortgage Division

Research shows more and more home buyers are going online to not only search for houses, but also to shop for home mortgages. Consumers who “raise a digital hand” expect a response within 24 hours and those companies first to respond gain a competitive edge and are better positioned to close the deal.

The Peoples Bank branch in Newport Beach, CA had been using a CRM system to manage their leads but wanted to see if new technology was available that would enable their marketing and sales management to be both more effective and more efficient and easier to use for their sales team. Because InSellerate was specifically designed to meet the needs of the mortgage industry, they chose to test the technology at one of their branches.

After installation and team training, all digital and non-digital leads were placed into the InSellerate technology. Automated dialing was initiated to increase speed to contact, and lead prioritization and recycling was used to optimize marketing ROI.

“Because most mortgage companies offer the same product and the same rates, it’s important to be attentive to prospects needs. With InSellerate, we were able to reach out and connect with prospective homebuyers in minutes — when they were actively in the decision-making cycle. When no phone contact was made, lead recycling and nurture took over to make sure our team took advantage of every sales opportunity. Our conversion rates increased from 7.7% to 10.25%, enhancing our ROI on marketing spend. And just with the lead recycling feature, we are seeing 15% of our total monthly production come from leads that would have been neglected in the past.”

Jim Lind

Additionally, Peoples Bank found InSellerate enabled their sales team to excel by giving managers real-time insight into the activity of their sales reps, showing effort and success rates and giving them the tools to appropriately coach individuals to higher performance levels.

“InSellerate is very intuitive technology; it’s easy to use. New hires can master the system in very little time — under 30 minutes. We can set our new sales reps up for success and they can literally hit the ground running the day they come out of training.”

Jim Lind

New branches are currently adopting the technology, exchanging multiple technology systems — call monitoring, marketing reporting, operations reporting, workflow management, lead recycling, nurture campaigns and more — for InSellerate’s comprehensive solution.



855-973-1646 • insellerate.com