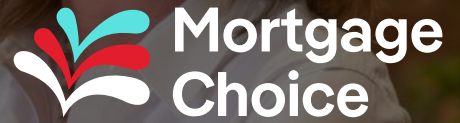




Clade - a Brennan company assists Mortgage Choice in their marketing automation journey



How Mortgage Choice is creating more meaningful customer interactions with intelligent automation.

A NEED FOR ORGANISATION WIDE VISIBILITY

Mortgage Choice, Australia’s leading mortgage broker with over 480 franchisees, embarked on a marketing automation journey with the key objective to deliver content to the customer that is highly relevant, at a suitable time and through a channel that’s convenient to them.

Mortgage Choice identified a number of gaps in their customer journey technology platform and reached out to Clade - a Brennan company to assist with a program of works leveraging the Microsoft Dynamics 365 and ClickDimensions solutions.

NURTURING LEADS THROUGHOUT THE SALES JOURNEY

The first program was focussed on Nurture Campaigns, delivering an automated series of communications to prospects based on initial identification of interests. “In order to deliver a consistent flow of high quality leads to our brokers, we need to warm up prospects, says Melissa McCarney, General Manager, Group Marketing at Mortgage Choice. “To accomplish that, we require a consistent experience and relevant conversations automated at scale.”

Clade worked closely with the internal marketing team to design the automation process within ClickDimensions, and Mortgage Choice can now successfully provide lead information relevant to their current journey, gauge their interest in that information and have a deeper understanding of the effectiveness and conversion rates of their nurture campaigns.

AT A GLANCE

Case Study
Mortgage Choice

Website
mortgagechoice.com.au

Industry
Financial Services

Company Size
1000+

Country
Australia

FROM LIST-BASED TO TRIGGER-BASED MARKETING

Trigger Based Campaigns were next on the list to implement, whereby email communications could be initiated in response to changes in their CRM data. Examples would include the anniversary of a loan, a birthday or an upcoming deadline as action points to deliver customised content to their customers. “This was a tricky requirement”, says Clade marketing automation specialist Kuba Borucki. “Mortgage Choice has a complex data set that, when using the standard functionality available in their CRM, made it impossible for the marketing team to accurately target customers falling into these more complex areas.

Although they were able to get ad-hoc assistance from their IT team, they needed a solution that would empower the marketing team and put control of their data into their own hands.” In collaboration with Mortgage Choice’s specialists, we pulled it off, and now Mortgage Choice reaps the benefits of being able to send tailored information based on specific triggers.

As a result of the success of the marketing automation journey, Mortgage Choice is planning its next automation campaign, leveraging gated content, and has asked Clade to assist with this new initiative.

[Learn more about Mortgage Choice](#)



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We provide powerful technology solutions for Australian organisations, with a portfolio of services that ranges from strategy and advisory, to application development, to end-user support, and more.

Our teams are crazy about delivering an exceptional customer experience for our clients, which is why we continue to invest in our people, systems, and automation. This has resulted in us achieving a world-class Net Promoter Score of +80.

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