



Customer Success Story

Client improved Sales, increased sales team's performance by lead automation

About the Client

The client is a leading mortgage solution provider in the US, offering home buyers straightforward homeownership and refinancing paths.

Solution

- Built a **custom account-based lead assignment model**.
- **Implemented lead assignment business rules** for new strategic lead notification.
- **Automated leads from target accounts** to appropriate Account Executives.
- **Implemented lead scoring** and grading models.

Benefits

- ✓ Increased sufficient time for account executives and sales managers to close deals.
- ✓ Percentage of quality-leads follow improved by 65%.
- ✓ Closing more deals by assigning right leads to the right team

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