

Integration Guidelines: Sales Boomerang & Insellerate

Integrating Sales Boomerang with your Insellerate Customer Relationship Management (CRM) delivers timely borrower intelligence directly to your inFlow lead queue. Loan Officers can access that intelligence without the friction of learning or logging into a new system, leveraging it for direct outreach and/or automated journeys for borrowers and prospects.

Enabling the Integration

To get started, have your organization's Sales Operations Manager or other CRM subject matter expert contact your Customer Success Manager at Insellerate or assigned Integration Manager at Sales Boomerang, respectively.

While the level of effort to set up integration will vary with your Insellerate instance, our clients report that on average they spend less than an hour on integration tasks. At a high level, these will include:

- Determining the types of records to put into Sales Boomerang and confirming the data sent.
- Reviewing the test alerts sent to Insellerate.

To streamline the integration process, we recommend these best practices:

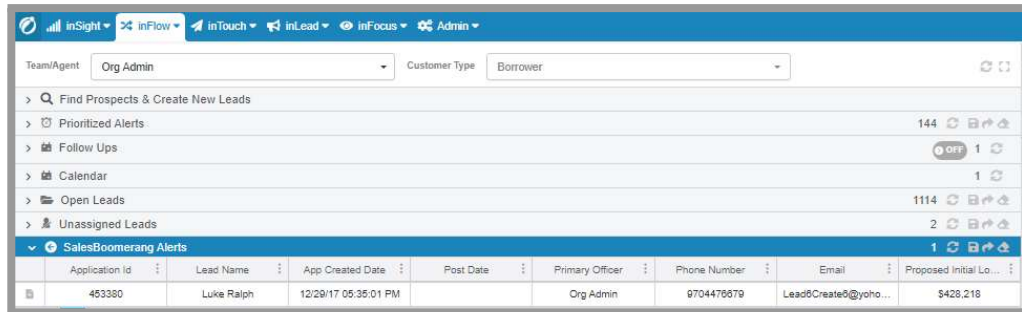
- Give Insellerate advance notice that you will be working with Sales Boomerang on this integration.
- Know and review your application/loan statuses and “no sale” application reasons up front (e.g. nurture, lost to competitor, etc.) – as these will affect the lead filters we set up to receive records into Sales Boomerang.

How It Works

Data exchange between Insellerate and Sales Boomerang works as follows:

- **Sending Records** - Records are sent to Sales Boomerang from Insellerate via API. Sales Boomerang will check for a full name and valid address, and will use Lead Filters to allow the records you want into our system. Depending on your configuration in Insellerate, when a record is updated in Insellerate (Application Created, Updated, Reassigned, or Status Changed) it is sent over to Sales Boomerang again. Sales Boomerang will deduplicate this record based on name and address and update the fields that have changed.

- **Receiving Alerts** - Alerts are generated in Sales Boomerang based on the watch settings you decide for each watch type, and then sent to Insellerate via API. (e.g. You might require a certain FICO score for a Credit Improvement alert to trigger.) The alerts will appear in Insellerate within 2 hours of Sales Boomerang receiving the alert.
 - Alerts display on the *Sales Boomerang* tab in the “inFlow” section of your Insellerate CRM.



- Loan Officers will see all of their lead’s alerts listed here. Per Insellerate permissions, other roles can see all alerts as well. This will be based upon configuration with Insellerate.
 - Click on each alert to see actionable details, including the type of alert that triggered, the date it was created, the FICO tier, and rate details.
- **Updating Records in Insellerate** - No existing Insellerate data is altered.

Once leads can flow to Insellerate, you will need to make decisions on workflows - how to follow up on an alert - as described next.

Making the Most Out of Borrower Intelligence

There are two approaches to leveraging Sales Boomerang alerts that are included with your Insellerate account, as described below.

	What it means:	Recommended for:
Direct Outreach	Use recommended email, text, and phone scripts from Sales Boomerang to reach out directly to your borrowers and prospects.	<p>Timely follow-up when someone is already in the market, as for Mortgage Inquiry, Listing, and EPO (early payoff) alerts</p> <p>Delivering good news related to Credit Improvement alerts</p> <p>Acting on Prescriptive Scenarios (Cash-out, FHA MI Removal, and Rate-and-Term), which provide rich data to surface near-term refinance opportunities with the borrower or prospect.</p>

	What it means:	Recommended for:
Automated Nurture	Establish a borrower/prospect journey through inTouch to send automated email, ringless voicemail, and SMS/text communications specific to each alert and the borrower/prospect's workflow status.	Life Events alerts, which provide an early indication of the need for a financial transaction (e.g. a borrower/prospect who is a recent Empty Nester may be interested in moving down to a smaller house, or a cash-out refinance or HELOC to remodel bedrooms for alternate uses. Equity, Rate, and Reverse Mortgage alerts, which provide an initial indicator that a refinance opportunity exists.

Your organization may choose to combine direct and automated outreach, at least until the Loan Officer has successfully engaged the borrower or prospect, as illustrated below.

Sample Nurtures

The following provide just a couple examples of the journey you might create following receipt of an alert. These examples typically used by Insellerate clients focus on text and email outreach, but personal calls can also be instrumental.

Equity Alert Follow-up



Listing Alert Follow-up



More Information

For more information, email the Sales Boomerang Integrations team at integrations@salesboomerang.com.