Integration Guidelines:
Sales Boomerang & Velocify

Integrating Sales Boomerang with your Velocify Customer Relationship Management (CRM) system delivers timely borrower intelligence directly to your Leads View within Velocify. Users can access that intelligence without the friction of learning or logging into a new system, leveraging it for direct outreach and/or automated marketing campaigns 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 representative at Velocify or SDP (Velocify's third-party consultant), along with your assigned Integration Manager at Sales Boomerang.

While the level of effort to set up integration will vary with your Velocify instance, most clients complete the tasks needed within a couple of hours. At a high level, these tasks will include:

- Create the field names within Velocify into which Sales Boomerang will deposit information
  - Sales Boomerang will provide a mapping sheet with these field names to you in the onboarding stage.
- Provide Sales Boomerang with the Velocify URLs, Velocify Client ID, and Velocify Campaign ID's for each watch type
  - Sales Boomerang will provide a mapping sheet with these field names to you in the onboarding stage. This mapping sheet will need to be returned to Sales Boomerang with the appropriate values for the webhooks to be set up within Sales Boomerang.
- Review the test alerts sent into Velocify
- Work with Velocify Support/SDP to verify workflows for each Sales Boomerang alert type

To streamline the integration process, we recommend giving Velocify/SDP advanced notice that you will be working with Sales Boomerang on this integration.

How It Works

Data exchange between Sales Boomerang and Velocify works as follows.

Sending Records

There are two ways to facilitate sending borrower data to Sales Boomerang:

- **Working with SDP:** If you are working with SDP, records can be pushed directly from Velocify into Sales Boomerang via an API. Please consult with SDP on the fields to map and desired frequency to push data.
  Notes: Sales Boomerang works closely with SDP to ensure a smooth integration process. Please note that SDP does require a Statement of Work (SOW) to complete any work for Velocify clients.
  - You can alternatively work with Velocify Support on integration tasks. The drawbacks are:
    - Velocify Support works their tickets in a queue and does not assign a singular resource to a project such as configuring the integration between Velocify and Sales Boomerang.
    - We cannot work with Velocify Support on your behalf; Velocify requires you to be the "middleman" in any instances where more information is needed.
- **Not working with SDP:** If you have not elected to work with SDP on this setup, Sales Boomerang must pull the records from Velocify via an API. To facilitate this data pull, we require the following information:
  - Client's email for their overall organization Velocify instance
  - Client's password for their overall organization Velocify instance
  - The date we should attempt to pull records from Velocify
    - For a new client, this is your go-live date with Sales Boomerang.
    - For existing clients adding Velocify integration, please specify the start date for data pulls.
  - The exact Velocify field names and associated numeric values to be mapped from the client's instance of Velocify to Sales Boomerang (e.g. firstName, 2).

Receiving Alerts

You will work with your Implementation Manager (and later your Customer Success Manager) to identify the best settings for each watch type (e.g., You might require a certain FICO score for a Credit Improvement alert to trigger.)

- Sales Boomerang alerts are generated based on those watch settings, and then sent to Velocify via API.)
- The alerts will appear in Velocify within 2 hours of Sales Boomerang receiving the alert.
- Records that have a Velocify CRM ID present when the alert triggers would update the existing lead within Velocify with the Sales Boomerang fields. If the record does not have a Velocify CRM ID when the alert triggers, a new lead is created within Velocify.

Making the Most Out of Borrower Intelligence

Once a Sales Boomerang Alert triggers within Velocify, you can see the details in your Leads view.

You may also work with SDP or Velocify Support to set up specific marketing automation workflows for systematic outreach to the borrower that aligns with your organization's goals.

There are two approaches to leveraging Sales Boomerang alerts that are included with your Velocify 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.	Timely follow-up when someone is already in the market, as for Mortgage Inquiry, Listing, and EPO (early payoff) alerts Delivering good news related to Credit Improvement alerts 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.
Automated Nurture	Work with SDP or Velocify Support to establish a borrower/prospect journey 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.

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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 journeys you might create following receipt of an alert. These examples focus on text and email outreach, but personal calls can also be instrumental, especially for Listing or other time-sensitive alerts.

Equity Alert Follow-up

1 Text

Immediate

Good news about your equity

2 Text

2 days after alert

Ensure we are meeting your goals

3 Text

7 days after alert

Reminder of prior outreach

4 Text

14 days after alert

Money in your home you could use

5 Text

15 days after alert

Courtesy call about options, no obligation

6 Email

30 days after alert

You need to see this

7 Text

30 days after alert

Bad time? Will check back again

8 Email

35 days after alert

Market shift: Put your equity to work

9 Email

50 days after alert

Alerted 2 days ago - your equity position changed favorably

10 Text

60 days after alert

Ready to hear more about your options?

11 Email

90 days after alert

Final equity notification - favorable change

■ Personal Touch

■ Official/Automated Touch

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Listing Alert Follow-up

1 Text
1 day after alert
Congrats on listing your home

2 Text
2 days after alert
Do you have your pre-approval letter?

3 Text
5 days after alert
Let's go over your options as a seller, and as a buyer

4 Text
7 days after alert
Even .25% change in rate affects the home you qualify for

5 Text
10 days after alert
Good partner – hope you are getting best service & pricing

6 Text
21 days after alert
Are you happy with your loan?

7 Email
30 days after alert
Congrats on listing your home

8 Text
30 days after alert
Team just alerted me you listed your home

9 Email
35 days after alert
No borrower left behind, 2nd attempt

10 Text
35 days after alert
Appreciate prior trust, let me show programs

11 Email
42 days after alert
3rd Notice - System alert notification

12 Text
42 days after alert
Get your pre-approval letter for next home; lender for life

13 Text
50 days after alert
Pre-approval letter

14 Email
56 days after alert
Final system alert notification

■ Personal Touch
■ Official/Automated Touch

More Information

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

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