

The Client – Mortgage Advisors

The Challenge...

The client is a mortgage advisor that provides expert financial advice to customers that are looking to buy their first home.

The client came to us at the beginning of the pandemic when they saw a surge in inbound enquires from those needing mortgage advice, primarily due to the financial impact of the first lockdown. Being an SME business with a small team, the client required assistance in managing these enquires, to ensure no customers or opportunities slipped through the cracks.

The Project...

The project involved managing all inbound enquires that the client received through phone calls and emails, working through a set of qualifying questions, and handing over opportunities to an advisor for them to follow up on.

The initial campaign began in early April 2020 and was set to be carried out 5 days per week until the beginning of May, with the aim of passing over at least 2 qualified inbound leads per day.

The Results...

Each day, our dedicated agents were handling at least 10 inbound enquiries and by mid-April, they had passed a total of 34 inbound leads across to advisors at the firm.

As we approached the end of April, the client decided they wanted to carry on the activity throughout the month of May as well to help their team effectively manage their inbound leads and enquiries.

The activity came to a close on 28th May 2020, with a total of 81 inbound leads being passed along to the client.

Case Study | Lead Generation



Overall, the client reported that around 72% of these leads converted (58 converted leads) and the campaign overall resulted in a 350% return on investment for the client.