



Customer Case Study

# American Mortgage Group

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AMG Increases Loan Applications 20%  
and Reduces Lead Cost by 30% with  
ClickPoint Lead Management Software.

What is lead management software? Lead Management Software is a Software as Service solution that enables salespeople and loan officers to more efficiently contact and close more leads, through the use of a set of sales best practices. Lead Management Software allows managers to set rules that automate much of the sales lead follow-up process with digital leads, live call transfers, direct mail campaigns, and self-generated leads.

American Mortgage Group, or AMG, has been helping homeowners and new homebuyers find the best home loan for many years. Headquartered in San Diego and servicing all 50 states, AMG found they were looking to expand with a scalable lead management software provider in 2016. In order to scale sales and servicing operations, AMG needed a fresh start with a lead management software provider that could help them with the complexity of managing three different sales teams. Because AMG focuses in refinance, purchase, and reverse mortgages, they found their current lead management software to be a limiting factor in simultaneously managing three different sales processes.

## **AMG Needed to Automate Their Sales Process in Order to Expand.**

Prior to ClickPoint, implementation leads were only being contacted on average two times per loan associate. Many leads were neglected, and routing leads to the correct loan officer was a manual and tedious process. Management was spending several hours per day monitoring the flow of leads, manually following up to ensure loan officers were calling leads, and re-prioritizing leads that were in need of attention. Trying to scale their efforts with this much manual oversight was a big problem and they needed a company that would help them automate as much of the manual oversight as possible.



## ClickPoint and Nextiva Partner to Provide Fully Integrated Lead Management Software and Cloud Communication Solution.

AMG was introduced to ClickPoint Software through their cloud-communication partner, Nextiva. AMG liked the fact that ClickPoint was fully integrated with their cloud communication platform and could provide lead management software that would effectively automate the follow-up process through a best practice called Pull Lead Management. The Pull solution keeps loan officers from cherry picking leads, and gives them a simplified sales screen to work from. The simplified sales screen allows loan officers to get more at-bats, enforces a high call volume culture, and reduces the need for manual lead prioritization. The ClickPoint lead management software serves up leads that are a best fit based on a variety of factors such as state licensing, age of lead, state calling hours, loan officer skill, and more.

### These best practices enable maximum sales efficiency and contact rate on every lead, enforcing a maximum contact attempt per lead

As a result, AMG experienced the following benefits post-implementation:

- ✓ An increase in total applications by 20%
- ✓ A decrease in cost per lead by 30%
- ✓ An increase in loan officer and manager efficiency
- ✓ AMG increased loan officer scalability and doubled loan officer head count in less than 60 days, post-implementation



“The ClickPoint team delivered for us big time. When I heard about the way their system works, in theory it was a no brainer, but we all know that execution is the most difficult part of a successful software deployment. ClickPoint has a fantastic support team and a great product. I was able to easily have our team communicate our sales process and ClickPoint implemented it, on time, and on schedule. As a result, we were able to double the size of our loan officer team as we started to see immediate results. Our lead cost dropped, our applications went up, and we were able to scale.”

**Mehdi Amini – Owner American Mortgage Group**

## About ClickPoint Software

ClickPoint Software provides cloud-based sales lead software designed to improve efficiencies for salespeople and their managers. ClickPoint is helping to transform sales organizations through the use of their core product, SalesExec. ClickPoint is committed to engaging customers and partners with amazing onboard and post implementation support. From its headquarters in Scottsdale, Arizona, ClickPoint has been helping companies both large and small close more leads in less time.

Learn more about ClickPoint by visiting [www.clickpointsoftware.com](http://www.clickpointsoftware.com)