

# Velocify Dial-IQ®

Dialing technology that's built for loan officers. Better conversations, happier customers and faster conversions.

Velocify Dial-IQ, intelligent sales dialing and call management platform, helps loan officers drive sales faster, engage in meaningful conversations that move loans to close and deliver exceptional borrower experiences. By combining Velocify's proven sales automation technology with an enterprise-grade dialing platform, loan officers can make more calls, connect with the right prospects at the right time and maintain the highest standards of customer service.

## Benefits

- Grow revenue
- Increase conversion rates
- Reduce time to close
- Increase sales productivity
- Deliver a better borrower experience

## Reliability

Phone outages severely disrupt sales teams' ability to prospect, follow-up and sell. Velocify Dial-IQ has an industry-leading uptime rate and delivers the call quality, speed and reliability that high-velocity sales teams expect.

## Productivity

Manual dialing, low connect rates and lack of focus hinder your sales team's productivity. Velocify Dial-IQ has the inbound and outbound features you need to streamline dialing, increase connect rates and keep reps focused on the most important sales activities.

## Control

Without visibility into sales rep activity, sales leaders cannot enforce the optimal contact strategy. Velocify Dial-IQ clears the path by providing visibility into rep activity and connecting it to sales performance data, delivering a holistic view of end-to-end sales effectiveness.

## Flexibility

Changing phone systems is a hassle. Velocify Dial-IQ fits perfectly with existing phone systems so sales teams can enjoy the benefits of a robust sales dialer without having to replace hardware or lose any existing phone features.

## Features

### Outbound

- **Click-to-call:** save time by calling prospects with the click of a button
- **Local caller ID:** increase the odds of connecting by displaying a local number to every prospect
- **Inbound/outbound blending:** enable reps to make outbound calls without the fear of missing out on valuable inbound calls
- **Pre-recorded voicemails:** move on to the next call while Dial-IQ leaves pre-recorded voicemails
- **Preview dialing:** review lead information before the call is placed, allowing loan officers to prepare and personalize their approach for higher value prospects
- **Call recording:** record calls for training, quality management and compliance monitoring
- **Persistent dialing:** don't waste time re-establishing a connection to the phone system; stay connected
- **Advance call transfer:** 3 ways to transfer calls based on intelligent logic; make cold, warm and no hold transfers with the click of a button
- **International dialing:** an enterprise-grade global sales dialer for companies that have international call centers, international leads or both
- **Time zone protect:** prevents reps from calling too early or too late depending on prospects' time zone
- **Call recording transcription:** an AI-powered tool that analyzes voice and messaging conversations in to automatically transcribe calls
- **Dial compliance rules:** configure rules to prevent calling numbers on the Do Not Call (DNC) lists, leads who have opted out, leads outside calling hours and wireless numbers without proper consent
- **Shotgun dial:** use competition to drive ultra-rapid response rates
- **Power dialing:** work through call lists quickly and efficiently
- **Next call:** dial the next best lead based on priority with the click of a button
- **Shake and stir, CNAM:** register phone numbers with carriers in-app for best call completion

### Inbound

- **Call routing:** automatically direct calls go to the right reps using an intuitive drag and drop call routing interface
- **Interactive call menus:** easily create call trees with an intuitive call flow builder
- **Auto-create lead:** automatically create new leads on inbound calls
- **Number provisioning:** obtain unlimited toll-free and local numbers to gain better control of your inbound calls
- **Call queuing and callback:** when all agents are busy, place callers on hold with custom music as they wait for someone to become available



“Within three months of inception, we exceeded every goal – 90% contact rate with revenues exceeding our expectations.”

**Joseph Semrani, Banking Executive M&T Bank**

## Advanced features

- **Live call monitoring:** survey reps' calling activities in real-time
- **Call barge:** supervisors can jump into sales conversations at critical points in a call
- **Call whisper:** supervisors can listen to rep-lead calls and coach repos with advice only they can hear Fast Connections
- **Time zone protect by state:** custom settings for when leads in each state may be called
- **Area code-based call recording:** abide by state rules for recording calls
- **Shotgun by phone:** offer new leads to multiple agents once by calling each agent
- **Shotgun by screen:** increase speed-to-lead by engaging with quickest agent to respond
- **Call monitoring dashboard:** real-time view of all active calls

## Reporting

- **Activity and performance reports:** make data-driven decisions with reports such as call volume, activity by agent and campaign performance. Track all calls in different time frames and with filters by lead etc.
- **Call tracking insights:** discover which marketing assets are driving the most inbound calls
- **Compliance support:** abide by TCPA - do not support random or robo-calling that is disallowed



**Reach us at:** 1-888-955-9100 or schedule a demo at [mortgagetechnology.com/solutions/customer-acquisition](https://mortgagetechnology.com/solutions/customer-acquisition)

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