

Lead Management Pipeline

Background & Challenges

The client, a prominent US-based regional bank, was experiencing a significantly lower conversions as part of their Portfolio Churn Reduction campaign. They were leveraging an existing AI/ML model that manually fed data to the end marketing systems. Lack of a Customer 360 view gave them poor visibility into their campaign failure

Objective

Achieve automated Mortgage Lead File delivery to end marketing systems – PEGA, Edge, Adobe Experience Platform based on triggers generated from various on-us and off-us sources

Approach

- Data sourced data from various vendors:
 - Credit worthiness: Experian, Zillow
 - Property Databases: CoreLogic, BKFS
 - Interest Rates: Curinos, Wave Engine
- Team created a framework to create triggers, validate recapture logic, and orchestrate to end systems

Solution

Off-us Data Ingestion: File delivery to vendors i.e., Experian, Zillow, CoreLogic, and Curinos for customers across the Mortgage portfolio of the client

On-us Data Ingestion: Near real-time (NRT) ingestion of account, relationship, and deposit data

Data Transformation: Three types of triggers, i.e. Month-on-Month, Scenario based, Life Events created based on ingested off-us and on-us data:

Rate Lock Engine: Accounts identified by combination of trigger were vetted by this module to establish feasibility of recapture basis trigger, propensity score, and business parameters

Event Hub Module: Accounts qualifying as leads post the rate lock engine parsed to push events into corresponding Kafka topics in HSP for orchestration to PEGA, Edge, and AEP

Key Results

100% Automation of Mortgage Lead Management Module

3x Lift in Refinance Campaign Conversions

About Straive

As a data analytics and AI operationalization company, we don't just build top-tier data analytics and AI solutions—we integrate them seamlessly into your core workflows. This approach drives enhanced efficiency, improves user experience, and boosts revenue, setting you apart from the competition.

Serving a diverse range of industries—including Pharmaceutical & Life Sciences, Logistics, Supply Chain & Manufacturing, Research & Publishing, Information Services, EdTech, Banking & Financial services, and Retail Tech, Entertainment & Media—we have a global client base spanning over 30 countries.

Our strategically positioned resource pool operates across seven countries, including the Philippines, India, the United States, Nicaragua, Vietnam, the United Kingdom, and Singapore, where the company is headquartered.