

Powered by Percy Driving Capture Rate

100% game changer. Prosperity Home Mortgage implements Percy with great results.

The Challenge

Prosperity, recognized for customer service excellence and a strong real estate brokerage alliance, selected Percy to improve customer retention and strengthen relationships between mortgage consultants (MC) and agent referral partners.

The Process

- Implement a customized Percy home valuation link on all MC websites.
- Co-brand with all Berkshire Hathaway Home Services agents to deliver superior services, including monthly home equity reports delivered to previous homebuyers.
- Reverse co-branding real estate professional partners with MC websites in a first-ever reverse co-branding initiative.
- MCs leverage Percy to provide previous homebuyers with monthly home equity statements to be front and center when borrowers decide to purchase their next home or when considering a home equity loan.
- Two-way integration with data flowing from MCs to Percy and from Percy to MCs.

The Outcome



- **100% Adoption**
Implemented for all MCs auto-inviting all past borrowers.
- **Automated Referrals**
Over 100,000 real estate agents have been co-branded as a Percy partner.
- **2-Way Integration**
Set up a synchronization to send/receive data with the lender's customer relationship management.
- **Real Estate Partnerships**
Percy can auto-sponsor other real estate agents and brokerages in their network.

“ Strong relationships are key to our success. We see Percy as a critical relationship-building technology tool that empowers our loan officers, agent partners and clients. We are integrating it within our five-year post-closing journey, a large marketing campaign focused on long-term client relations and reinforcing loan officer-agent relationships. We value the cutting-edge innovation Percy brings to Prosperity. ”

- Jelaire Grillo, Brand Ambassador

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