

Building society implements BookingBug for mortgages



Yorkshire Building Society needed to convert more leads to mortgage applications

Yorkshire Building Society has selected BookingBug's omnichannel software to help boost its mortgage application conversion rates, the company has revealed.

Yorkshire Building Society wanted to make it easier for customers to apply for a mortgage, such as offering them the opportunity to book an appointment to see an advisor online and ensuring they are able to find the information they need about the vast array of products the building society offers.

The building society rolled out BookingBug after researching into other products on the market. Yorkshire Building Society found the software to be easy to use and it integrated with the company's current software, meaning minimum disruption.

BookingBug presents a number of questions to customers who want to apply for a mortgage, which then allows them to schedule appointments based upon this screening process. By cross-referencing with staff calendars in Outlook, it can not only ensure the timing for the appointment suits the staff member, but also put the meeting in their calendar too. This information is updated should the customer change or cancel an appointment.

"As well as seeing a significant increase in in-branch mortgage appointments, we've cut the admin time to book and qualify these appointments in half. This frees up our branch staff to focus on what matters most: delivering excellent customer service," Steve Finch, senior manager of digital development at Yorkshire Building Society, said.

Following such positive results, Yorkshire Building Society has now decided to expand the departments using the technology.

"It doesn't stop here, YBS has a transformative roadmap ahead of us. We're already considering this technology for other areas like savings appointments. Working with leading tech providers like BookingBug is what helps us to keep ahead in such a competitive market," Finch added.