



ADVANCING MARKETING.
AMPLIFYING RESULTS.

Case Study: Mortgage Retention Campaign

Omnichannel Outreach



THE BACKGROUND

A regional financial institution wanted to retain existing mortgage clients who had recently listed their homes for sale, knowing these customers would soon be in the market for new mortgages.

THE CHALLENGE

The Bank's marketing team faced three key challenges:

- Timely Identification locating mortgage clients who had listed their homes within the past 7 days.
- Multichannel engagement delivering consistent, personalized messaging through both digital and direct mail advertising.
- Compliance and Brand Control ensuring every communication met strict regulatory and branding standards across distributed teams.

THE SOLUTION

A data-driven end to end marketing campaign solution along with fulfillment services.

- Pinpointed customers in transition by monitoring new home listings.
- Personalized direct mail with loan officer contact info and tailored offers.
- Outbound sales support via targeted call lists integrated directly into loan officers' systems.
- Digital reinforcement using IP-targeted banner, video, and OTT ads.
- Compliance safeguards through pre-approved templates and audit-ready controls.

THE RESULTS

Within the first 30 days, the campaign achieved a **5% direct mail response rate**, resulting in **20 new mortgage applications**, while outbound loan officer calls generated an additional **10 closed loans**. IP-targeted digital ads reinforced the message, **lifting conversion rates by 18%**. Overall, the campaign produced over **\$3M in retained mortgage value**, delivering a **15x ROI**.



DIGITAL ADS:

18% LIFT,
\$3M RETAINED,
15X ROI



DIRECT MAIL:

5% Response,
20 Applications,
10 Closed Loans

ABOUT VYA

For over 26 years, Vya has been the trusted marketing partner to more than 500 financial institutions nationwide. With deep expertise in **regulatory compliance**, **campaign fulfillment**, and **omnichannel execution**, Vya enables financial marketers to launch personalized, compliant campaigns with speed and precision to maximize reach and ROI.