

# DOCMAGIC

*Mortgage software technology firm, DocMagic, needed a better way to manage sales leads collected during the 35-40 industry events the company attends annually. **Lead Liaison's event lead management solution, GoExhibit!™**, enabled DocMagic to streamline their lead retrieval process, capture accurate lead information including qualification data, report on key event ROI metrics, confidently track the lead from capture to close.*

## INTRODUCTION

Event Lead Management solutions like GoExhibit!™ help companies streamline the process of collecting and managing leads from marketing events. Advanced lead capture programs allow companies to design custom forms, instantly provision mobile devices, quickly capture leads on site using a mobile app, and then immediately segment, qualify, distribute, follow up with, and nurture leads without missing a beat. This case study shows the value that DocMagic found in Lead Liaison's solution, GoExhibit!™.

## PROBLEM

DocMagic is a leading provider of fully-compliant loan document preparation, compliance, eSign, eDelivery and comprehensive Digital Transaction Solutions for the mortgage industry. Founded in 1987 and headquartered in Torrance, California, the company develops software, mobile apps, and web-based systems for the production and delivery of compliant loan document packages. DocMagic's suite of technology solutions is designed to advance the mortgage process at every stage, improving the experience for lenders, settlement service providers, investors and borrowers.

DocMagic attends 35-40 marketing events each year. The company was looking for a way to capture lead information from a business card or a badge. The technology also needed to qualify leads and ensure data accuracy.



"We needed a way to better qualify, collect, and track every lead. We experimented with scanner companies, but we kept looking for a better solution that requires less manual effort," explains Senior Marketing Executive at DocMagic, Robert Madsen. "Scanners seem inefficient and error-prone. Yes, you can get your leads at the end of the show, but then you have to go back and decipher everything and manually import the data into your CRM. There's no flexibility in the process."

Madsen continues, "I don't think I'm alone in this challenge. Event attendance is costly, and we want to make sure that marketing and sales receive all properly qualified leads. We were also looking for a way to track the number of prospect engagements per salesperson and calculate the cost per lead."

## SOLUTION: GOEXHIBIT!™ EVENT LEAD MANAGEMENT

GoExhibit!™ allows for quick capture of lead information on iPhone, iPad and Android devices. Data collected flows seamlessly into any CRM. It enables users to acknowledge an engagement quickly and send an immediate follow up to prospects through either native automation, or others via integration.

## RESULTS

DocMagic used GoExhibit!™ for their biggest event of the year, the **Mortgage Bankers Association's Annual Convention & Expo** in Washington, DC. They purchased GoExhibit!™ only a few days before their high-stakes event. They anticipated around 5,000 attendees. "We had less than ten days to implement, but customer success is what Lead Liaison knows best," explains Madsen.

One of the things DocMagic liked about GoExhibit!™ was the ease of implementation. Madsen explains, "It was easy to download the app, easy to setup the forms, and easy to connect the app with Salesforce. Lead Liaison configured and checked every form, tested every connection, and even made sure every lead was handled with 100% data accuracy."

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DocMagic created a simple lead capture process using a mobile application that runs on iOS, Android, and Windows, called GoCapture!™ to snap a picture of the badge barcode or business card, qualifying the lead based on the product of interest, and assigning a campaign name. The information flowed into Salesforce.com, where it was automatically assigned to an existing Salesforce lead or account owner. Within a few minutes each lead received a follow-up email. Real-time workflow allowed sales and marketing managers access to instant tracking and reporting. All this with the assurance that lead follow up begins while the prospect's interest level is still high.

By implementing GoExhibit!™, the company now has a high level of confidence that all leads are being captured and immediately saved into their CRM. Additionally, Lead Liaison provides a service on the back end that ensures lead data is correct.

"With GoExhibit!™ we receive 100% accuracy on all lead data captured and uploaded into Salesforce. The app eliminates a lot of costly manual labor and ensures real-time capture for immediate follow up while the prospect interest is high."

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