



Matic

A low-lift solution helped a leading servicer generate revenue and increase recapture rate at no cost.

R Matic recently engaged with one of the largest, fully integrated, non-bank mortgage servicing companies in the US. Their lines of business include loan servicing, residential mortgage lending, a co-issue purchasing program, and a homeownership marketplace designed to help customers increase transparency on the total cost of homeownership. Their mission is to serve homeowners and all of their homeownership needs.

Challenges

Since homeowners are constantly inundated with refinance offers from competing lenders, the servicer wanted to differentiate itself in the market and recapture more of its customer base. Like many servicers, though, the company's communication with customers was usually limited to a one-time engagement at the beginning of the relationship. Aside from monthly statement notices, which customers rarely engaged with, the servicer didn't have much regu-

lar interaction with its homeowners.

With this limited communication, the servicer was finding it difficult to stay top of mind and retain its customers. To tackle this problem, they wanted to create new touchpoints that provided unique benefits to their homeowners in the hopes of building loyalty. Through a partnership with Matic, the servicer was able to do just that.

Solution

With the help of Matic's industry-leading technology, the servicer was able to add value to its servicing relationships by offering insurance savings to customers. The two teams worked together to implement a low-lift, two-way secure data file exchange between the servicer and Matic. This allowed Matic to utilize the servicer's customer data and augment it with detailed third party data to get complete customer profiles. Matic then used this data and its unique quoting engine to return personalized insurance quotes that featured

known savings for the servicer's customers.

With customized quotes in hand, Matic and the servicer team created, tested, and launched compelling email marketing campaigns to the servicer's customers, strategically delivered at the time of a customer's policy renewal and escrow analysis. These campaigns helped the servicer generate additional revenue, create positive customer touchpoints and ultimately strengthen their servicing relationships at no cost.

Partnership Results

2x

Recapture
Rate

Customers who purchased insurance through Matic were twice as likely to recapture than the overall customer base.

- **22%** recapture rate for Matic customers
- **11%** recapture rate for whole customer base

88%

Of the servicer's customers who bought a policy with Matic said they were highly satisfied with their experience (9 or 10 rating).

\$415

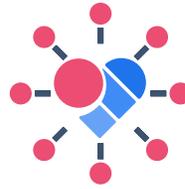
Average annual savings for the servicer's customers

Why Matic?



Customer Experience is Priority #1

Our Net Promoter Score of 88 – nearly 2x the industry average – exemplifies our commitment to the customer experience. Our cross-sell program enhances customer loyalty and drives affinity with your brand.



Our Carrier Relationships Deliver Value

We make it easy for partners to harness the power of our carrier network and provide their customers with the best insurance rates and coverage. Customers save hundreds of dollars on insurance annually through Matic.



Unparalleled Data and Technology

We leverage data to create a personalized experience that's unique to your customer's profile. Our integration methods were built for the mortgage industry and extended to meet customers' needs across auto, landlord, fintech, and more.



Built for Partnerships

Our compliance-first approach and growth mindset ensures that your program appreciates over time. We understand the intricacies of regulatory oversight and pass third party audits like WCAG, SOC2, and Pentest.