

From Mortgage Loan to Meaningful, Lifelong Banking Relationship

A Homebuyer's Tale



Meet Maddie Jones, a single mom of two ready to trade in her starter house for her dream home. Follow her journey from borrower to loyal customer with a MeridianLink-powered financial institution.

It Began With an Application

Maddie enjoyed a swift, simple application and approval process thanks to MeridianLink® Mortgage with:

- A user-friendly, on-brand, intuitive POS experience.
- A built-in product & pricing engine with real-time, accurate, multi-product quotes.
- Automated, rules-based underwriting.



She & Her Kids Closed on Her Perfect House

Within ten minutes, Maddie received her pre-approval letter. From there, she found a house she loved, made an offer, and sailed through loan approval. She closed just 30 days later. This was possible with:

- Secure eSignature tools so Maddie could sign documents on the go.
- Built-in eDoc capabilities to share, edit, & upload documents in real time.
- Flexible workflows & automations that kept the process moving fast.



Then Came the Personalized Post-Close Cross-Sell Offer

Maddie also had balances on two credit cards. The financial institution offered to consolidate them into one lower-interest loan, making repayment easier. This was possible thanks to:



Integrated MeridianLink consumer & mortgage lending tech.



Personalized cross-sale solutions driven by data.

And Became a Customer for Life

Because her financial institution's mortgage and consumer lending systems were integrated with MeridianLink's industry-leading mortgage and consumer tech, Maddie's financial profile was clear, enabling timely and tailored outreach.

She felt valued as a person, not just another sale. Soon, she moved all her accounts to the new, MeridianLink-powered institution, and became a happy lifelong customer.



See the MeridianLink Mortgage Difference

- Greater trust through targeted, solutions-based outreach, not arbitrary offers.
- Impactful campaigns & segmentation backed by data targeting consumer preferences.
- More wallet-share with strategic offers rooted in customer advocacy.
- Higher long-term value driven by intentional solutions.



Strong customer advocacy can boost wallet share by up to 30%

—SOURCE: ACCENTURE.COM



Investing in relationships can speed up growth by 2.6x

—SOURCE: ACCENTURE.COM

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