Sage SalesLogix | Customer Success

Challenge

Mortgage Lenders of America needed a CRM system that would support their efforts of managing leads, as well as generating new ones.

Solution

Sage SalesLogix provides a method for tracking leads and the ability to pull data based on lead type. The solution also provides tools to better manage the business and employees.

Results

Sage SalesLogix provides Mortgage Lenders of America with a more efficient and accurate method of managing leads and calculating their rate of return. Plus, it helps streamline processes and improve productivity.

Mortgage Lenders of America Selects Sage SalesLogix Over Salesforce to Drive Business

Privately held Mortgage Lenders of America, LLC, is the largest non-bank owned mortgage company in the Kansas City area and the largest purchase lender for Lending Tree®. Based in Overand Park, Kansas, Mortgage Lenders of America is approaching their tenth anniversary and is currently licensed in 35 states.

As the recipient of the 2009 Lending Tree® Top Customer Service Award, Mortgage Lenders of America, LLC employs 60 loan officers whose main focus is to convert mortgage leads into closed loans. Mortgage Lenders of America purchases thousands of leads from various lead providers and needed an efficient and logical way to capture, track, and analyze those leads. They also needed a solution that was capable of monitoring data within business applications to streamline processes and uncover potential opportunities. Mortgage Lenders of America found this solution in Sage SalesLogix.

Sage SalesLogix Meets Every Requirement

After a lengthy market search and proposals from three vendors, Mortgage Lenders of America selected Sage SalesLogix over competing CRM systems, GoldMine® and Salesforce. The company preferred Sage SalesLogix based on its ease-of-use interface, robust sales process automation, lead management, and ability to generate reports. The extensive customization and integration capabilities in Sage SalesLogix enabled Mortgage Lenders of America to tailor the system to address their unique needs.

Philip Kneibert, president and managing member, adds, “In addition to Sage SalesLogix, we considered Salesforce, but chose Sage SalesLogix because it was more economically feasible in comparison, and its customizable features were superior to Salesforce.”

Customer

Mortgage Lenders of America, LLC

Industry

Financial Services

Location

Overand Park, Kansas

Number of Locations

Three

System

Sage SalesLogix

Add-On Product

Sage KnowledgeSync

Generating Leads

When Mortgage Lenders of America made the decision to enter the online mortgage business, the company began to investigate CRM systems to better support their efforts of buying leads.

Prior to implementing Sage SalesLogix, Mortgage Lenders of America relied on manual lead entry. This solution did not provide a method for tracking leads or the ability to pull data based on lead type. Mortgage Lenders of America also had no way of measuring how leads were converting. Kneibert explains, "The cost of leads can be very expensive. Sage SalesLogix gives us the ability to track, measure, and manage valuable leads." Kneibert adds, "This helps Mortgage Lenders of America to not waste leads."

With the implementation of Sage KnowledgeSync, Mortgage Lenders of America can monitor incoming business leads. Management can filter through data and send alerts and follow-up actions based on clearly defined, personalized conditions.

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> Mortgage Lenders of America

Helping to Define Processes

Since using Sage SalesLogix, Mortgage Lenders of America has been able to clearly define sales processes. Their sales process encompasses a unique seven-step sales cycle which includes lead reception, initial customer contact, proposal and acceptance, and finalizing the loan. From a manager's perspective, Sage SalesLogix provides a valuable tool to help employees successfully navigate this clearly defined process, while providing a dashboard of successes and losses.

Kneibert explains, "Based on data reports pulled from Sage SalesLogix, Mortgage Lenders of America is able to identify what processes employees are struggling with and provide assistance."

Marketing Support at Your Fingertips

With Sage SalesLogix, Mortgage Lenders of America is able to direct their marketing messages to specific groups or prospects and segment customers with user-friendly filtering tools. They can also view marketing campaign details within Sage SalesLogix to determine what campaigns were sent, opened, and clicked through. This information is helpful when facilitating customer calls.

"Our focus as a business is on purchase transactions, we have been able to build a robust marketing campaign from the information managed in Sage SalesLogix," says Kneibert.

Generating Leads and Tracking ROI

"Before purchasing Sage SalesLogix, we had no method for tracking ROI and customer base growth," explains Philip Kneibert.

With Sage SalesLogix, Mortgage Lenders of America is capable of determining client ROI from generated reports. Kneibert adds, "I am confident that the increase in efficiency that we have experienced due to implementing Sage SalesLogix has paid for the software."

Note: Customer is a participant in the Sage Customer Reference Program and may be eligible for participation-based incentives.

About Sage SalesLogix
Sage SalesLogix offers a complete view of customer interactions across departments—providing information and insights for better planning, managing, and forecasting. Your teams will have the tools to increase sales, reach more profitable customers, enhance the customer experience, and anticipate customer needs. Sage SalesLogix offers flexible access, deployment, and payment options to address business requirements.

About Sage North America
Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and midsized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.

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