



CASE STUDY

A LEADING LENDING COMPANY BASED IN TEXAS

Dash Board that helped Texas based mortgage Lender to set goals and have control over leads till funded stage.

Company Profile

- A mortgage home lender with more than 20 years of experience in financing industry
- Dallas , Texas , USA

Challenge

- Find a customizable all in one dash board solution that would extract data from sales CRM and LOS system and make in to a meaningful decision that helps the organization in achieving the set goals.

Benefits

- Implement quickly under challenging deadlines
- Increased efficiency
- Improved number of loans
- Better sales(user) experience
- Ability to customize reports
- Check performance of loan officer
- Statewise process loan details
- Visual display of charts
- Maintain hierarchy
- User access and permission

The BackGround

A Decade old Mortgage finance lending company based in Dallas . Currently focuses on home finance lending and have done end to end automation for retail and mortgage Loan Origination processes but have been unsuccessful in maintaining the sales numbers from leads received from Sales CRM and from LOS system .

We have been looking out for a solution to understand the leads vs app vs Lock vs funded

The Solution

Client has a decentralized operating model but are known for fast turnarounds on its loans. With Finix Dashboard solution we can customise the system to fit our needs, search loan wise , loan count , loan officer, performance report with stunning visual display of charts and above all run customized query.

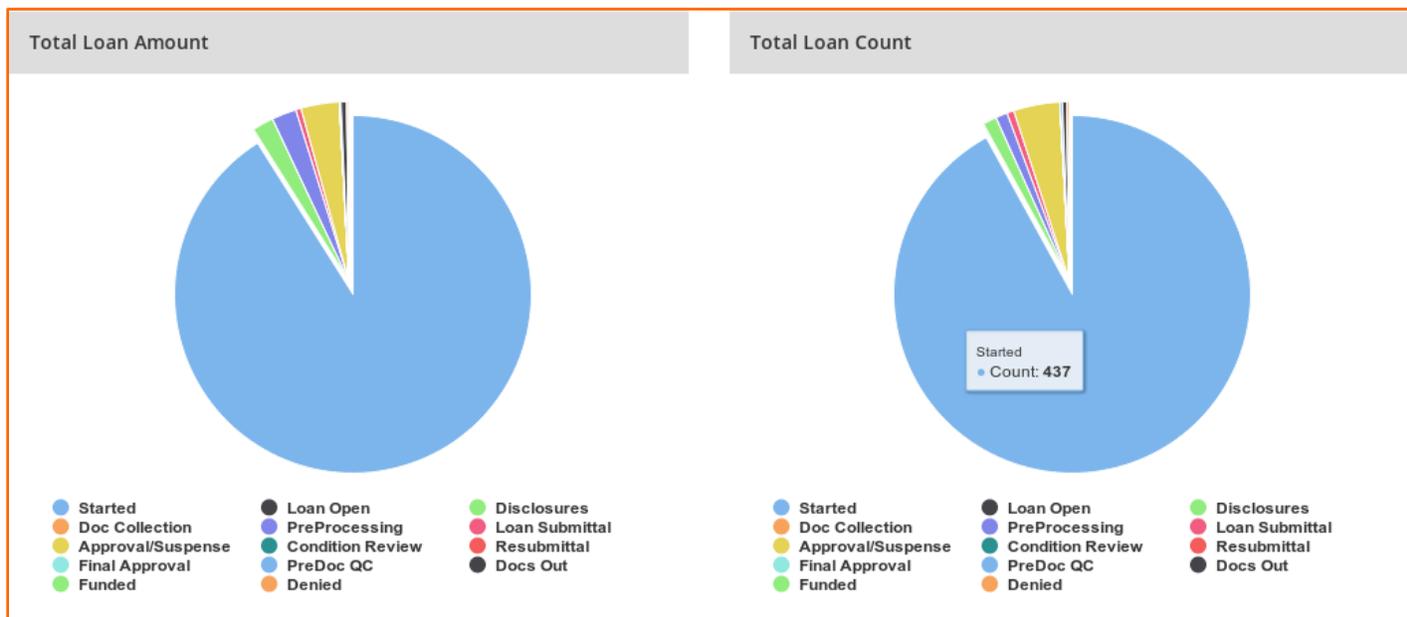
Finix team were extremely valuable in walking us through what was possible in the system

The Implementation

Client had a very strict dead line to complete the Dashboard as they were losing money and also identifying potential leads closure. The Design and development started rolling live in to a pilot and solution was handed over in about 45 days.

The Result

- Set Goals were easily monitored and achieved
- Better Understanding of loan officers performance
- Improved efficiency
- Better understanding of leads % vs Apps % vs Lock% vs funded%



“We see FINIX less as a solution provider and much more as a partner.” - Vice President of Technology, Mortgage Home Lending - Texas