

Implementing Microsoft Dynamics CRM Solution for a Mortgage Loan Broker Organization

Microsoft Dynamics CRM Solution

Apt CRM solution to smoothen the loan inquiry tracking process and record data from various websites to attract more leads using Microsoft Dynamics CRM.



PROTECTED

Client: **Protected by NDA**

Country: **United States**

Industry: **Financial Services**

About the Client

The organization was founded in 1999 with the express purpose of helping churches meet their financing goals. Each year they work with thousands of churches to help them understand their financial position by providing free advice and valuable insight on church financing (church loans, church mortgage, church refinancing, etc.)

Challenges

- The client was facing difficulties maintaining records of leads from several platforms that led to losing out on a few of them sometimes.
- They had to manually send emails throughout the lead generation process - which was a tedious task
- The client could not map lead activities in one place

Approach

The solution architects at DEV IT thoroughly understood the client's requirements. They conversed with software experts and CRM professionals to map a strategy that would satisfy the client's expectations and beyond. They decided to build a customized solution using Microsoft Dynamics CRM online and SSRS Reports.

Quicks Insights



Challenges

- Difficulty in maintaining records from several platforms
- Sending manual emails to several leads was tedious
- The client could not map lead activities in one place



Solution

- Implementation of Microsoft Dynamics Marketing and Sales Module and integrating the same with Microsoft Dynamics CRM
- Automate the lead capture process
- Built a loan inquiry tracking process
- Sending automated emails was made possible



Result

- Automation of lead to loan closure process
- Lead generation from various websites was made possible
- Tracking all the lead activities was made possible
- Automated emails to the leads at predefined timelines
- Managed marketing for several campaigns
- Dynamic Pivot Report Builder helped generate user reports

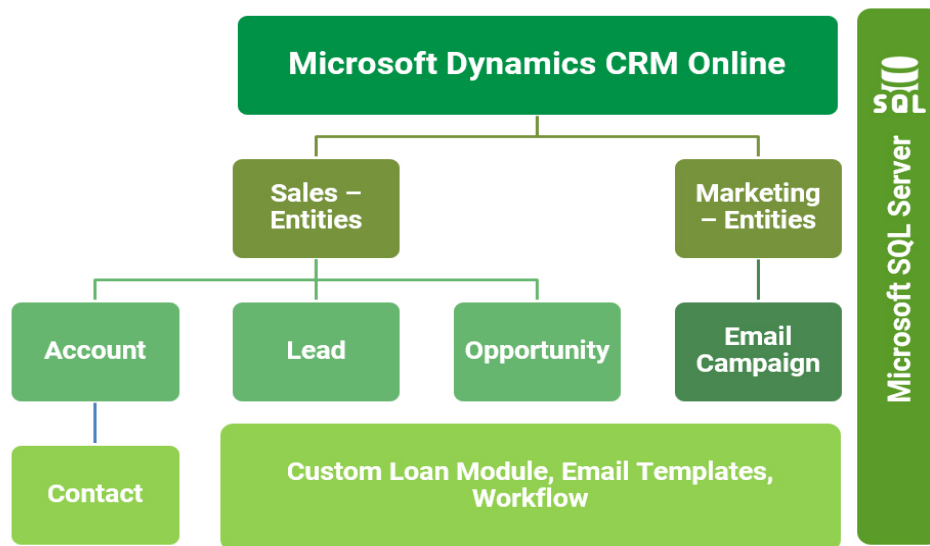


Technologies Used

- Microsoft Dynamics CRM Online
- SSRS Reports

Solution

- We implemented the Sales and Marketing modules of Microsoft Dynamics CRM Online. We integrated the same with the Inquiry Form on the customers' website to automatically capture the lead in the CRM.
- We build a process to track every lead's loan inquiry process.
- We helped the client send automated emails to the lead every time there were changes in the lead status.



Outcomes

- The lead to the loan closure process had been entirely automated.
- Automated lead generation from various websites
- The client could keep a watch on all the leads and brokers' activities and documents from one point.
- Sending follow-up emails within predefined timelines was made possible.
- The client could manage a common marketing list for multiple campaigns.
- The Dynamic pivot report builder helped the user to generate reports.

About DEV IT

DEV IT is public listed (NSE-DEVIT) organization based at Ahmedabad, India. For more than 2 decades, the organization has evolved into a multi-faceted unit with 1200+ strong, skilled workforce providing cutting-edge software and infrastructure solutions in Cloud, Data and Automation domain. DEV IT provides services to government departments, public sector organizations across several states in India as well as 100s of clients worldwide from diverse industry sectors: healthcare, travel and hospitality, manufacturing, professional services, retail, transportation and logistics and more.



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