



## OptifiNow Helps Mountain West Financial Streamline Relationship Management

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Up to 79% of marketing leads never convert to sales due to insufficient lead nurturing efforts, according to research from Marketing Sherpa. Nearly two thirds (65%) of B2B marketers don't have lead nurturing processes in place.

[Mountain West Financial](#), a mortgage brokerage with more than 400 employees, half of which are field-based agents, has improved lead generation and nurturing since implementing [OptifiNow](#).

Over its 20-year history, Mountain West Financial has evolved its internal processes to be completely paperless. Agents in the field spend most of their time engaging new prospects, including real estate agents, attorneys and builders, to create a network of referring partners to help drive incoming loan applications. Meanwhile, in-house agents manage incoming calls and leads directly with clients applying for loans.

With OptifiNow, Mountain West Financial has removed its lead management and CRM software and now operates in a more efficient, streamlined fashion. The entire Mountain West Financial team can communicate in real time, track activity and access detailed notes about customer preferences, account statuses and more.

“OptifiNow has created a more efficient and effective environment for our loan officers,” said Doug Cavanaugh, Branch Operations Manager for Mountain West Financial, in an interview with *Channel Marketer Report*. “Since they are more efficient they have been able to service more clients, they have been able to grow their own sales pipelines, which has made everyone more happy.”

Since implementing the OptifiNow system, Mountain West Financial has seen conversion rates grow consistently. Before using the solution, the sales team was at a 6% conversion rate. Now, the company is resting at an 11% conversion rate. Costs per funded loan have dropped, leading to \$360,000 in additional annual profits. Finally, agents have saved five to 10 hours per week creating and executing marketing plans.

Mountain West Financial uses a variety of OptifiNow products, including:

- **Leads onDemand**, which captures, tracks and nurtures inbound leads from different campaigns. Loan officers manage their leads and capture all information required to begin the loan process.
- **Sales onDemand**, which helps Loan officers capture, track and nurture affiliate relationships with realtors, accountants and attorneys.

- **Lead Link** enables loan officers to link referring affiliates, the agent handling an account and specific consumers. Using the module, agents can track which affiliate introduced them to which customer, and then analyze the value of each relationship.
- **Marketing onDemand**, which helps outside agents access co-marketing materials in real time and customize them for events and open houses.
- **Content onDemand** offers real-time access to all pre-approved sales and marketing electronic documents from a central library. All materials are compliant with brand and legal guidelines, and can be delivered to referring partners quickly and seamlessly. Training materials and articles on the industry can be stationed in the library so agents can access them as needed.

“Multichannel communications provided by OptifiNow, including email, direct mail and print, have helped us maintain compliance in our customer-facing communications,” Cavanaugh said. “Loan officers no longer need to draft their own emails; the OptifiNow system creates the appropriate communication and sends it to the consumer from a brand and legal compliant library of messages.”

Due to the success of OptifiNow thus far, Mountain West Financial is exploring Social onDemand, which is designed to help the company manage its social media compliance requirements.