

SUN WEST + OPTIFINOW

How Sun West Mortgage Broke the CRM Mold with OptifiNow



AT A GLANCE

Challenges

- Custom-made LOS proprietary to Sun West Mortgage
- Multiple sales channels: distributed retail, hybrid consumer direct, and wholesale
- Each sales channel operates in a way that's unique to Sun West

Benefits

- Better sales and marketing control
- Lower cost
- Ease of use
- Better data visibility



"OptifiNow is so flexible that we adopted the platform across all of our channels. When we saw how well it supported our traditional retail and Home Buyer Connect channels, we decided to use them for our wholesale division. Again, our approach to wholesale is different from other lenders and OptifiNow delivered a solution that fit us like a glove."

John Brummund
Executive Managing Director
Sun West Mortgage Company

OBJECTIVES

Sun West needed a CRM that could easily work with their one-of-a-kind LOS system. They wanted a customizable CRM that fits their way of doing things because everything they do, from sales to operations to servicing, is distinctly Sun West. Finally, they needed a powerful CRM that could handle all their different sales channels.

SOLUTIONS

OptifiNow Flex, a flexible CRM solution targeted towards multi-channel lenders, became the singular CRM that powered Sun West Mortgage.

OptifiNow Flex successfully and seamlessly integrated with Sun West Mortgage's proprietary LOS, a feat other vendors struggled with. OptifiNow customized their CRM to fit Sun West's way of working, and it fully supported Sun West's different sales channels: retail, hybrid consumer direct, and wholesale.

BENEFITS

Comprehensive sales and marketing governance

Centralized control and deployment of sales policies and marketing collaterals.

Optimized cost

Lower total cost of ownership and access to OptifiNow's team of CRM experts.

Enhanced data tracking and oversight

One data hub for sales activity and volume.

Organization-wide adoption

User-friendly interface promotes swift adoption and unified system eliminates confusion among managers.

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OVERVIEW

Founded in 1980, Sun West Mortgage Company, Inc. is a veteran of the mortgage lending industry, emerging as one of the largest independent lenders in the U.S. Their success hinges on a distinctive corporate ethos that has been core to their success. John Brumund, executive managing director at Sun West states, "We don't emulate the competition. From sales to operations to servicing, everything we do is uniquely Sun West. We even built our own loan origination system. That's why it was not easy for us to find a CRM solution that fit our particular way of doing business."

CHALLENGE

Sun West has a traditional, distributed retail model with loan officers located in branches, but they were also deploying a new hybrid consumer direct model they call Home Buyer Connect (HBC). HBC manages high inbound call volumes, swiftly connecting borrowers with licensed loan officers for pre-qualification. To maintain engagement, speed, and responsiveness are crucial.

While Sun West previously experimented with various CRM solutions, they discovered most were tailored to smaller organizations with a single loan officer perspective. According to Brumund, their processes are broader and built for scale, making traditional CRM approaches inadequate. After spending eight months attempting to align another CRM with their unique sales and marketing process, Sun West turned to OptifiNow to see how they could adapt to their specialized needs.

SOLUTION

Brumund chose OptifiNow for its versatility, "OptifiNow has the flexibility to support different sales processes, which is exactly what we were looking for." Because of OptifiNow's experience with high-volume call centers, they effortlessly integrated with Sun West's lead generation and telephony systems. OptifiNow boasts an intelligent business rules engine and an integrated email marketing tool that directs inbound leads from marketing sequences to designated agents.

OptifiNow extended its API integration to connect with Sun West's proprietary Loan Origination System (LOS), enabling real-time data exchange to trigger automated messages.

"OptifiNow is so flexible that we adopted the platform across all of our channels," noted Brumund. "When we saw how well it supported our two retail channels, we decided to use them for our wholesale division. Our approach to wholesale is unique and OptifiNow delivered a solution that fit us like a glove."

Brumund acknowledges that their success with OptifiNow goes beyond technology. He values the strong relationship they've formed with the company, describing OptifiNow staff as an integral extension of their team. He appreciates their "White Glove" service, explaining, "OptifiNow collaborates closely with our leadership team, implementing our ideas and content into the platform. We are lenders. We're not in the business of building a CRM."

Sun West's adoption of a single CRM platform for all lending channels has many advantages. Brumund highlights, "Using one system simplifies our operations. Marketing creates campaigns centrally, and the user-friendly system reduces confusion among teams. We can now generate reports without having to combine separate exports, saving time and enhancing decision-making."

Brumund notes, "We've observed a noticeable increase in response and conversion rates, surpassing other CRM platforms we've used. While it's challenging to measure the system's full impact due to our strong business performance, the invaluable execution, flexibility, and close partnership with OptifiNow are immeasurable. Having a partner that adapts and grows with us is our key differentiator."