

The Industry's Most Flexible CRM Solution

Designed by You. Built by OptifiNow.

The OptifiNow Flex CRM & Marketing Platform is a web-based solution that combines CRM, email and SMS marketing automation and robust API integration capabilities to deliver a customized experience for any type of mortgage lending organization.

OptifiNow is the only custom CRM that supports Retail, Wholesale, Correspondent, Consumer Direct and Reverse Mortgage channels in one platform.



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An all-in-one CRM that is designed to fit your needs

OptifiNow Flex is unlike any CRM platform because it supports all mortgage channels in one platform. Retail, wholesale, correspondent or consumer direct. OptifiNow Flex is the only CRM that is designed for multi-channel mortgage lenders, saving them time, money and the frustration of managing multiple vendors.

Our expertise in mortgage lending combined with comprehensive CRM administration services provides lenders with a powerful and cost-efficient way to manage sales and marketing.

Key Features and Benefits

OptifiNow Flex has innovative features and tools that address the diverse needs of different lenders and different teams.

Feature	Benefit
Core CRM System	Designed to support all types of mortgage lending channels: retail, wholesale, correspondent, consumer direct. OptifiNow CRM provides tools to track activities, store notes, upload documents and automate sales processes.
Email & SMS Marketing	OptifiNow has a powerful email and SMS engine that delivers both manual and triggered messages at blazingly fast speeds. Personalized messages, scheduled delivery and a unique custom email creation tool enables anyone to be their own marketing team.
Sales Enablement	Enable your team to create personalized collateral such as flyers, presentations and even social media images. Co-branding and white label options provide even more flexibility to easily create professional marketing materials that enhance relationships, drive sales and add value to your CRM.
API Integrations	Combine functionality and data from tech stack to drive better processes and insights. OptifiNow integrates to hundreds of vendors – LOS, POS, pricing engines, telephony – making us one of the most interoperable platforms in the industry. OptifiNow leverages external data to drive unique processes and intelligent workflows.
Business Intelligence	Convert your data into actionable information that drive your overall business strategy. OptifiNow's powerful Business Intelligence engine aggregates data from inside our CRM and combines it with external data sources to create custom reports and dashboards that allow you to hone your sales, marketing and business strategies in real-time.
Automation Engine	Highly flexible, rules-based engine used to create complex automated actions. The Automation Engine is used in a wide variety of scenarios where clients want to increase the efficiency and speed of tasks, from data management to unique integration enhancements.

"Marketing and selling mortgage loans is so much more sophisticated today. If you don't have the ability to get your message in front of borrowers and act quickly when they respond, you're out of business. OptifiNow allows us to compete with the big boys without emptying our wallets."


Brian Roe
 Vice President of Sales
 Open Mortgage

"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 Brumund
 Executive Managing Director
 Sun West Mortgage Company

Configuration and Customization


OptifiNow Flex delivers higher performance and better ROI because it is designed by our clients. They tell us how their CRM should look, behave and integrate. Our job is to fulfill their wishes, resulting in higher CRM adoption and better user satisfaction. Create your own CRM experience with OptifiNow Flex.




Custom UI
 Uncluttered and focused only on data that matters, a custom User Interface enhances adoption and improves data utilization.



Integrations
 Integrate everything and turn the CRM into a data hub that directs the flow of information throughout the entire tech stack.



LOS Data
 Utilize LOS data to drive automated notifications, classification and scorecard models and trigger unique functionality



Automation
 Leverage a rules-based engine to create complex automations that dramatically increase efficiency and scalability

Managed CRM Administration Services

OptifiNow engages with clients unlike any other CRM vendor. Our Managed CRM Administration Services emphasize continuous client engagement. After initial implementation, our team collaborates on a regular basis with clients to ensure that their CRM is operating at peak performance and ready to be changed when necessary.



Daily System Review

OptifiNow daily internal meetings to review each clients' system, monitor ongoing project status, review client feedback.

Weekly Client Meetings

Weekly meetings with clients to provide system and project updates, gather user feedback, manage tasks.

Quarterly Platform Review

Review system performance, business processes, user adoption and assess strategic goals.

Best Practices Consulting

Share new features, integrations and processes with clients to explore continuous improvement opportunities.

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