



OptifiNow Demonstrates Multi-Channel Flexibility with Implementation of Sun West Mortgage Wholesale, Distributed Retail and Home Buyer Connect Lending Groups

Sun West Mortgage cites CRM platform flexibility and an unprecedented level of support for successful multi-channel implementation.

BUENA PARK, Calif. and SEAL BEACH, Calif. – OptifiNow announced that Sun West Mortgage Company (Sun West) has launched their cloud-based CRM and marketing automation platform for wholesale, distributed retail and their all new Home Buyer Connect (HBC) mortgage lending channels, demonstrating multi-channel flexibility that simplifies sales and marketing management for the Southern California-based lender.

“Supporting multiple lending channels is a challenge for any mortgage lender, so we knew it would be hard to find a single CRM solution for our three sales groups,” said John Brumund, Executive Managing Director at Sun West. “We’ve got wholesale, distributed retail and our Home Buyer Connect (HBC) group, which is a hybrid consumer direct and distributed retail sales model. OptifiNow not only delivered all three channels, but they adapted to our unique way of doing business, especially in the Home Buyer Connect channel where there are so many moving parts.”

Using what they call a White Glove service approach, OptifiNow worked closely with Sun West’s sales and marketing teams to customize the platform for each channel. Sun West provided the blueprints for automated email campaigns, business rules and data-driven triggers, which OptifiNow used to implement the platform for their wholesale, retail and HBC environments.

In the case of Sun West’s HBC group, a complex lead funnel seamlessly delivers leads to call centers, requiring a robust phone system integration that matches specifically identified borrowers to appropriately licensed inside loan officers. Pre-approved buyers are then delivered to outside originators to manage the process through closing.

“It would have cost a lot more and taken us much longer if we tried to manage the CRM ourselves,” Brumund noted. “OptifiNow’s team eliminates the need for us to have an in-house CRM administrator. Not only do they execute our campaigns and keep our system up to date, but they even provide feedback and let us know if something doesn’t make sense. They work as if they were on our staff”.

“There’s no cookie-cutter approach to mortgage sales and marketing,” said John McGee, CEO of OptifiNow. “For many lenders, their sales and marketing process is their major competitive advantage. It’s important that we really understand how a lender wants to use our system, build it to their specifications and deliver a working system as quickly as possible. That’s why we consider our White Glove service component to be as important as our technology”.

About Sun West Mortgage Company, Inc. (NMLS ID 3277)

Sun West Mortgage Company, Inc. is licensed nationwide and is a full service, mortgage banker established in 1980. The company's excellent service and fast turn-time has made Sun West a multi-billion-dollar national originator. As a result, Sun West is a leader in offering a diverse set of products with low rates and excellent pricing. Sun West is a HUD-approved mortgagee (FHA & HECM), VA LAPP approved, USDA lender, Fannie Mae and Freddie Mac Seller / Servicer and Ginnie Mae Issuer and Servicer. Sun West is a leader in HMBS, residential, and commercial securitization.

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About OptifiNow

The OptifiNow platform combines CRM, Intelligent Sales Automation, Configurable Sales Processes, Sales Enablement, Reporting & Analytics and a robust API with integrations into a variety of complementary technologies. Many Lenders use different sales platforms for their Retail, Reverse, and Wholesale products lines, forcing them to maintain, train and support multiple technologies within their companies. OptifiNow offers a single platform that Lenders can offer to their Loan Officers, Account Executives & Call Center Agents, while Management can build their benchmark sales processes and gain critical insight on business performance to maximize revenues. More information can be found at www.optifinow.com/industries/mortgage.