

## iMortgage

### Business Profile

iMortgage Services (iMS) provides appraisal and title management services to a broad cross-section of the financial services industry.

### Key Outcomes

- Proactively identified and grew new market opportunity when market shifted
- Clear recognition of where to focus mortgage product sales efforts
- Insight into sales activity
- More effective use of sales resources

### Industry

Mortgage services for financial institutions

### TrueFit Solution

Implement Microsoft Customer Relationship Management (CRM).

### Customer Comment

“Our relationship is not a customer/vendor relationship. It is a true partnership. It is a great experience. We appreciate the constant follow-up.”

*Shawn McCall, COO*

## TrueFit Helps iMortgage Services Increase Customers By 50 Percent With Help From Microsoft CRM

iMortgage Services (iMS) provides financial institutions with the mortgage information that they require quickly and reliably.

They provide a variety of services -- from collateral evaluation to consulting services -- performing residential appraisals and title services in all 50 states. The company

has received many accolades, including a ranking in Entrepreneur Magazine’s “Hot 100 List” in 2003 and 2004, a two-time ranking in Pittsburgh Business Times “Pittsburgh Top 100 list” - 1st in real estate sector for fastest growing companies, and as a Finalist for SBA Small Business of the Year in 2004.

iMortgage was started in April 2000 by owners Brian Uffelman, President, and Shawn McCall, COO, based upon the idea that a capable vendor management firm was an asset to mortgage lenders looking for outsourcing options. With a client base consisting of most of the top 10 multi-state lenders in the country, such as Merrill Lynch, Ameriquest, Bank of America and Wells Fargo, iMortgage performs about 50,000 appraisals a years for 175 clients.



### Business Situation

When Uffelman and McCall reviewed their business in 2003, they found a gaping hole in their sales approach. The company, which was using Microsoft Outlook for contact management, lacked a defined sales process and were unable to accurately forecast future sales. A key problem existed in the area of customer types. A few years ago, their primary clients were originating mortgages, but the industry was shifting to other markets, such as Home Equity and Foreclosures. Because of the many different categories within the industry, they were never able to tell where they stood. In a business where putting all your eggs in one basket can be costly, Uffelman and McCall knew that they needed a solution that would be able to add definition to their sales process and accurately forecast sales, while being easy to use and compatible with their current platform.

Uffelman and McCall already knew that a Microsoft solution was the best option for them. They were using a Microsoft operating environment with Microsoft Outlook as their primary sales tool. But because it was manual and time consuming, they knew that the solution they needed would have to be faster and more accurate. They had also just finished a conversion to Great Plains, which reinforced their Microsoft loyalty. They had been introduced to TrueFit through a sales call, and after an initial meeting with TrueFit executives, they decided that TrueFit could provide them with the solution that they needed to succeed in their business.



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## Solution

After evaluating the problems facing iMortgage, TrueFit determined that Microsoft CRM was the best fit.

This solution would allow iMortgage employees to access customer information using a Microsoft Outlook or Web browser client, while offering improved business productivity with real-time customer information.

Because it is easily customized to suit individual business needs, Microsoft CRM would allow iMortgage Services to retain the control that they desired, while capitalizing on a solution that could be built from the ground up.

## Benefits

McCall says that since the implementation of Microsoft CRM, he has become a "much more informed owner." He and his partner are aware of what is going on at all times, and they can create exception reports now that indicate how their sales team is responding to the market trends by focusing on the right mortgage-related products. Their sales process also continues to evolve. With a very minimal learning curve, Microsoft CRM has provided them with the efficiency they desired.

They are also better prepared for customer drop offs. When a processing center shut down and they lost one of their bigger customers, they were able to replace their revenue in four months. Along with the revenue replacement came a customer increase - they grew from between 80-90 customers to 175 in four months. The size of their prospect database has also increase to over 5,000, allowing them to target all of the markets within their industry.

iMortgage Services was impressed with TrueFit as an organization. With a customer service philosophy that matched iMortgage's, TrueFit was able to provide them with a true partnership, not a typical customer/vendor relationship.

"TrueFit was unbelievably professional and very accommodating," McCall says. "They kept us on-budget and on-time. They did a great job!"

## About TrueFit

TrueFit combines inspiration and collaboration to create technology solutions that truly fit a company's needs and enable that organization to work better, faster and smarter. Our technology solutions are business solutions that empower individuals and organizations to be more flexible, agile and responsive. TrueFit partners with companies and organizations in manufacturing, distribution, health care, financial services, professional services, and a host of other industries and professions. Founded in 1997, TrueFit is headquartered in Pittsburgh, PA. For more information, visit [www.truefitsolutions.com](http://www.truefitsolutions.com).

