

SOLVE MORTGAGE + OPTIFINOW

OptifiNow Empowers Solve Mortgage's Wholesale Lending Growth



SOLVE MORTGAGE™
JUMBO & NON-QM WHOLESAL E LENDING



AT A GLANCE

Challenges

- Effectively scaling a sales team
- Need for a CRM tailored for wholesale lending
- Complexity and cost of well-known CRM systems

Benefits

- B2B database structure
- Enhanced broker responsiveness
- Streamlined account management
- Facilitates scalability
- Cost-effectiveness



“OptifiNow's impact on Solve Mortgage is nothing short of transformative. With features tailored for wholesale lending and ongoing support, Solve Mortgage is thriving. It's not just a CRM, it's our success partner.”

Blake Scheifele
Solve Mortgage

OBJECTIVES

In the wake of the 2021 refinance boom, Solve Mortgage faced the challenge of effectively managing its growing sales team. The search began for a robust Customer Relationship Management (CRM) system to streamline account management, enhance broker responsiveness, and facilitate scalable growth.

SOLUTIONS

Solve Mortgage experienced a rapid transformation in just 30 days, courtesy of OptifiNow's tailored CRM designed specifically for wholesale lending. The business-to-business (B2B) database structure ensured a strategic organization of contact records within company data – a foundational element crucial for wholesale lenders. Unique features like the rate sheet distribution tool and automatic NMLS de-duplication underscore OptifiNow's expertise in serving wholesale lenders. OptifiNow also stands out for its cost-effectiveness compared to other CRM systems.

BENEFITS

Turnkey tools crafted for wholesale lending

Strategically engineered solutions offering a seamless fit for wholesale lending setups.

Scalability

A flexible CRM infrastructure that effortlessly accommodates business growth.

Better Sales and Marketing Controls

Seamless integrations with marketing and sales tools that not only mitigate compliance risks but also empower users with consolidated access to everything in a single, streamlined platform.

White Glove Service

Direct access to CRM vendor leading to efficient communication, prompt issue resolution, and cost-effectiveness by eliminating unnecessary intermediaries.

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OVERVIEW

Solve Mortgage, a leading nationwide wholesale lender specializing in jumbo and Non-QM loans, stands out for closing even the most challenging loans and fostering lasting broker relationships.

CHALLENGE

Founder Blake Scheifele faced a crucial operational challenge as Solve Mortgage's sales team expanded post the 2021 refinance boom. The need for a Customer Relationship Management (CRM) system became evident to enhance account management, broker responsiveness, and scalability.

EVALUATION PROCESS

Blake thoroughly assessed six CRM systems, realizing that many were designed for retail lending, lacking essential features for Solve Mortgage's wholesale operations. While considering established options like Zoho and Salesforce for their customization capabilities, their complexity and associated costs were daunting. OptifiNow stood out with its out-of-the-box focus on wholesale lending, offering a B2B database structure and cost-effectiveness. Its tailored features and affordability made OptifiNow the preferred choice during the evaluation, addressing Solve Mortgage's specific needs efficiently.

OPTIFINOW IMPLEMENTATION

During the 30-day implementation, OptifiNow's B2B database structure, rate sheet distribution, and NMLS de-duplication tools proved invaluable. OptifiNow's support continued post-implementation, offering a dedicated account manager to handle any requests, and ensuring tailored features met Solve Mortgage's needs.

RESULTS AND IMPACT

OptifiNow transformed Solve Mortgage's operations, enabling rapid business scaling, efficient broker account management, and streamlined processes. Integrated marketing features provided control over content and compliance monitoring. Direct collaboration with OptifiNow minimized risks and contributed to sustained success.

CONCLUSION

Blake's decision to implement OptifiNow positions Solve Mortgage for future growth, addressing immediate challenges and empowering the company to navigate the evolving mortgage industry landscape confidently. OptifiNow proves to be a strategic partner in Solve Mortgage's journey towards sustained success and expansion.