COMPANY CASE STUDY

CRM Solutions for the Mortgage and Healthcare Industry

OVERVIEW

A leading provider of Customer Relationship Management (CRM) solutions for the mortgage and healthcare industries.

BUSINESS CHALLENGES

The client's third-party development team was unable to continue supporting their CRM system. They needed a new development partner to maintain and enhance their CRM product, while also migrating from an in-house server to the cloud to improve security and performance.

RESULTS

- Increased system efficiency and stability.
- Improved performance with faster response times and minimized downtime.
- Ability to onboard more clients due to enhanced system scalability.
- Integration with key third-party services improved workflow automation and productivity.
- Implementation of modern solutions made the CRM more competitive and user-friendly.
- A secure and future-proof system capable of handling growing demands.

ONGOING SUPPORT

Since 2015, SenarySoft has provided continuous CRM support with near 24-hour IT coverage, thanks to our global support teams based in the Philippines and the United States.

SOLUTION

SenarySoft provided a skilled development team that:

- Upgraded the client's legacy system to support new features and improve security.
- Migrated the CRM system from an in-house server to a cloud-based platform for increased scalability and reliability.
- Integrated the CRM with key third-party services, including:
  - Phone systems: Ytel, RingCentral, CallTrackingMetrics, Five9, Nextiva, Zoom, MS Teams, and Vonage.
  - Loan Origination Systems (LOS): MeridianLink (LendingQB), Encompass, and Ellie Mae.
  - Lead generation platforms: Credit Karma, Lending Tree, Lender Price.
  - AWS technologies: Redshift, Quicksight, S3, and Aurora.
  - Productivity tools: CKEditor, ChatGPT, MMI.
- Implemented automated processes to streamline repetitive tasks, reduce manual workloads, and boost operational efficiency.
- Continuously added new features and enhancements to keep the CRM modern, competitive, and scalable.

☎ +1 (323) 739 8827

✉ www.senarysoft.com

📍 5120 Hamner Avenue Ste 140 #818, Eastvale, CA USA