



Case Study:

**How B2B Mortgage
Brokerage Experienced
Exponential Growth with
CRM**



bluroot
CRM Software Solutions

COMPANY OVERVIEW

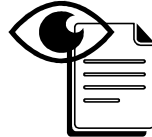
Butler Mortgage's operation efficiency improved by 50% with greater insights



16
Trusted
Internal Users



35%
Improved Lead
Conversions



100%
Visibility on
Operations

"BluRoot has always provided us excellent service coupled with fantastic support. They continue to innovate and provide us with products/services that grow with us."

~ Ron Butler



Ron Butler
CEO of Butler Mortgage

FOUNDED 1997
HQ LOCATION Toronto, Ontario
INDUSTRY Mortgage Brokerage
SIZE 10,000 clients and 100 employees
PRESENCE Canada Owned and Operated
PREVIOUS TOOL Outlook,

About Butler Mortgage

Butler Mortgage Inc. offers expert, unbiased mortgage advice so you can feel confident in getting the best-available mortgage rate and features. Butler shops the entire Canadian Mortgage Market so that clients can concentrate on making the move go smoothly. Butler takes time to explain steps in plain English to make sure the client is completely comfortable. Only then will Butler shop to Canada's leading mortgage lenders who compete for the opportunity of funding your mortgage.



Canada's #1 Broker for two consecutive years

THE GOAL

Track Every Client Interaction *in One* Centralized Platform

PROBLEM STATEMENT

What is an easier way to track, compile and analyze my customer data?

Previous to BluRoot and Zoho CRM, Butler Mortgage relied on one person's Microsoft Outlook and hand-written notes to keep track of client data, lead information and meeting details. This required considerable manual input and unnecessary photocopies to pass information to the sales team.

Butler Mortgage indicated these areas to be improved:

- Lead Management
 - Lead conversion rate was being impacted by operational silos
- Tracking
 - Management lacked clear awareness of customer pipeline
- Organization
 - Absence of easily-accessible database with all customer information created disconnect between departments

SOLUTION

Perform a digital strategy transformation to move operations from pen-and-paper to faster cloud solutions

Butler Mortgage sought to establish competitive advantages in a cutthroat and rapidly evolving mortgage landscape.

BluRoot found their inefficient management of clients coupled with marketing and lead generation expenses were leading to a lower than anticipated ROI.

BluRoot identified these targets to **streamline operations and save money**:

- Automate sales process to minimize time and decrease manual input
- Digitize customer database to allow every department transparent access to all customer information
- Create a discovery form to make onboarding new clients simpler

TOP OPERATIONS OBSTACLES

42%

CROSS-CHANNEL
INTEGRATION

46%

INTEGRATED CUSTOMER
DATA & ANALYTICS

400,000

EXCEL CELLS STORING
CUSTOMER DATA

ACTION PLAN

2. Task Design and Planning

After compiling observations and analyzing collected data, BluRoot presented findings

BluRoot outlined the initial two step plan:

- i. **Automate:** Leads from website into Zoho; then instantly assign to a sales rep for follow-up
- ii. **Digitize:** Customize CRM and consolidate different data sources into the CRM database



1. Full Discovery

Interviewed the owner, head of sales, and underwriters to identify areas of improvement.

Major BluRoot findings:

- **Inefficient:** Customer info and upcoming mortgage renewals passed to departments via manual photocopies
- **Lacking:** No automatic reminders to staff or clients when renewal date upcoming
- **Disconnect:** For access to additional customer data, the process required asking for data instead of viewing on CRM



3. Beta Rollouts

To prevent shock within the firm, a phased approach helped Butler cope with new systems

Consisted of:

- a) Integrating existing lead sources to one centralized CRM platform
- b) Automating new leads from website to CRM; trialed phase in for a day, week, and then full-time
- c) Creating the capability for sales reps to take notes and set follow-up dates



4. Complete Adoption

Once Butler Mortgage felt comfortable with the digital transformation, began further implementation

Involved:

- 2 Full-Days of onsite training (Tutorial, coaching, evaluation)
- Automatically sent mortgage application forms and email reminders for incomplete forms
- Developing the customer pipeline to track leads -> deals -> sales



5. Perpetual Retainer

Working with Butler since 2013, BluRoot has become acclimated to our clients operations and holds a SLA to perform new tasks for Butler when needed.



RESULTS



500% Increase in client retention rate



100% ROI in just over 3 months of implementation



3x Faster lead conversions

Establishing automated processes and a centralized, digitalized database via the CRM system led to **decreased customer wait times**, **increased conversion rates**, and **immediate cost savings**



Compliance

Introducing a CRM that stores all historic, present and prospective clientele data allows for better documentation to meet regulatory standards and audit requirements



Increased Employee Satisfaction

Employees found that the centralized CRM systems which integrated their many different applications made operations simpler and faster



Surveillance

The designed beginning-to-end customer pipeline allowed management to visualize operational bottle-necks and forecast next quarters deals



"The impact with BluRoot was instant and significant. Taking a chance to alter my operations worked fruitfully for Butler Mortgage as BluRoot increased visibility for my operations and ultimately improved my conversion rate. Don't hesitate to get started with BluRoot; they know their stuff.

~ Ron Butler
CEO of Butler Mortgage Inc.

MAIN TAKEAWAYS

Butler Mortgage Inc. sought new strategies and technologies to maintain pace with competition and grow the business. Although Butler was initially skeptical of implementing drastic changes to a successful formula, the realized benefits of automating business processes were instantaneous.

Instead of checking each individual platform or relying on one person's outlook calendar, management can use Zoho CRM to immediately see which channels are performing and which may need additional help.

Ready to make life easier? Request a BluRoot demo today!



BluRoot was established because of a disruptive idea: offer customized CRM software for an affordable price that simplifies the complex. For years, our staff has developed impactful business relationships with 100+ clients utilizing our CRM services. We have been putting smart tools in the hands of people in diverse sectors inspiring these businesses to make confident decisions. We remain committed to enriching the well-being of our clients by providing excellent customer support to help them meet their goals.

INTERESTED IN LEARNING MORE?

Contact customercare@bluroot.co for more info




Like what you see?
We would love to chat with you!


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IMPORTANT LINKS

- [BluRoot About-Us](#)
- [BluRoot Blog: *What is the Cloud*](#)
- [Other Case Studies](#)

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