



Case Study



Client

Financial Software Solutions Company services over 250 Banks and Credit Unions while processing hundreds of thousands of transactions per year. The Company provides technology solutions to mortgage lenders nationwide and serves as a middleware application that provides access to a host of national and local real estate service providers via the web or through direct integration into various loan origination systems.



Challenges

Developed reporting suite by industry veterans, savvy developers, and a dedicated operations team all pushing to create a product that will delight customers and make their jobs easier.

With such a fabulous and industry-driven solution, their Director of Marketing consulted us for a precise resolution that suits their needs with re-gards to acquiring business database from the Financial sectors of Lenders, Mortgage Bankers, Community Banks, Credit Unions.





Solution

After the great conversation with the client, we understood that the database requirement for the specified industries is not a solution to kickstart the marketing outreach. We conducted an extensive research and proposed a new approach to establish their market in the Financial Industry business model to conquer the market of Lenders, Mortgage Bankers, Community Banks, Credit Unions at a larger scale. Upon the detailed conversation with our Business Development pioneers, their management has approved to start their foundation in United States (all 50 states) and acquired the proposed database of Mortgage Bankers & Loan Correspondents, Mortgage Originators, Mortgage Lenders, Commercial Mortgage Brokers, Loan Originators, Loan Assistants, Loan Processors, Underwriters, Closers in Financial Industry sectors.

After evaluating various options in terms of internal resource, other vendors and alternate marketing models. The client Opted to start with the below project.



Project Specifications



Target Audience

Lenders, Mortgage Bankers, Community Banks, Credit Unions



Geography

United States



Counts

10,230 with email address



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