

Surefire Case Study

SecurityNational Mortgage Company

SecurityNational Mortgage Company engages 10 times as many customers with 10 times fewer resources using SurefireCRM and integrated tools

Company Profile

HEADQUARTERS:

Salt Lake City, Utah

FOUNDED:

1993

WEBSITE:

SNMC.com

A subsidiary of SecurityNational Financial (NASDAQ: SNFCA), SecurityNational Mortgage Company is a top-50 mortgage lender providing top-notch service to communities coast-to-coast.

A top-50 retail mortgage lender with 800-plus employees, SecurityNational Mortgage Company (SecurityNational) has served communities coast-to-coast since 1993. SecurityNational pins its success on delivering top-notch service and expert-level guidance to pair borrowers with the best-fit mortgage for their financial situation.

10 Times the Reach with 10 Times Fewer Resources

Chief Strategy Officer Eric Bergstrom oversees SecurityNational's Business Services division, encompassing a team of marketing experts that use Top of Mind's SurefireCRM to manage sophisticated marketing campaigns for the lender's 500-plus loan originators (LOs).

"Out of the box, SecurityNational LOs receive a monthly maintenance-free marketing plan managed by our Business Services division. Each month our Business Services division uses SurefireCRM to build nurture

campaigns for three audiences: leads, clients and referral partners,” he explained.

Bergstrom calls his SurefireCRM-enabled system the ‘10x 10x’ because it has delivered 10 times the customer reach with 10 times fewer resources.

“The results of an internal marketing experiment compelled me to switch from tasking LOs with running their own marketing programs to administrative-led marketing deployments,” Bergstrom said. “In our test region, administrative-led SurefireCRM marketing

deployments increased the number of weekly marketing emails sent from 3,000 to 30,000. That’s where the first ‘10x’ comes from. What’s more, our open rate shot up to 30% and our bounce and spam rates fell to below 1%.”

“The other ‘10x’ comes from the immense resources saved by centralizing the marketing process,” continued Bergstrom. “We no longer need to invest in frontloaded marketing training for LOs, nor do we need assigned resources to answer the same methodology questions over and over again. A small number of Business Services personnel can achieve much higher customer engagement for a fraction of the resources versus multiplying out four hours of marketing across our entire 500-plus LO workforce each month.”



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Creative Campaigns that Win Hearts and Minds

As its name suggests, the Business Services division at SecurityNational provides a wide range of operational support services; it’s not staffed with dedicated marketing gurus. Rather, the secret to SecurityNational’s remarkably high audience engagement is SurefireCRM’s library of award-winning, customizable creative content and automated delivery capabilities.

SurefireCRM’s content library is loaded with thousands of emails, text messages, dynamic videos, landing pages and lead forms customizable with SecurityNational’s branding and corporate messaging.

“One of the greatest differentiators when you compare SurefireCRM to other platforms is their amazing content. We are a huge fan of SurefireCRM’s dynamic videos and interactive pages, because our organization prides itself on engaging our communities and helping borrowers make informed decisions,” said Bergstrom.

According to Bergstrom, SurefireCRM’s ‘Around the Neighborhood’ video is a favorite. That’s because it positions SecurityNational as a reliable local expert for current and prospective customers, real estate agents and other referral partners. The animation retrieves property data

in real time to generate unique content educating borrowers on factors that could impact the value of a home, from recent neighborhood home sales to school zones to the typical commute.

SurefireCRM enables SecurityNational's Business Services division to schedule an entire month's worth of marketing campaigns in minutes. The 'set it and forget it' benefits of automating campaigns with SurefireCRM allow the team to perform their many other duties, such as onboarding and training new staff, acting as user admins for the company's mortgage systems and providing sales support.

Co-Branding Capabilities

Since SecurityNational is highly invested in the communities it serves, developing collaborative relationships with local Realtors is key. Aiming to keep LOs focused on lending, SecurityNational devised a partner platform request process so LOs can access co-branding materials that drive partner referrals.

"Once our Business Services group receives a partner platform request form, they browse SurefireCRM's creative content library of co-brandable flyers, emails and dynamic videos for an on-target campaign for the occasion, upload the partner logo and schedule it out."



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"LOs love our co-branding service because they don't have to lift a finger. I love it because as a strategy-minded person, I know LOs are more likely to co-brand when they don't have to build campaigns, and our Business Services group can turn

around a co-branded holiday card or extended campaign much faster than an LO," Bergstrom explained.

APIs and Integrations For the Win

A forward-thinking mortgage professional, Bergstrom years ago sensed that mortgage technology would shift toward an API model. Thus, SecurityNational's vendor evaluations now hinge on providers' ability to integrate with other platforms. Top of Mind offers dozens of custom and API integrations with industry vendors, allowing SecurityNational to connect its systems to eliminate redundancies and enhance their collective value. SecurityNational leverages direct or API-enabled integrations between SurefireCRM and the following systems:

- **SimpleNexus** (mobile point-of-sale app)

When borrowers download the SimpleNexus app and create an account, all of their contact information is populated into SurefireCRM. LOs can access their entire SurefireCRM database directly through the LO version of the app. SecurityNational was even able to customize the integration by anchoring the 'Around the Neighborhood' video in the SimpleNexus app, so borrowers can learn about neighborhoods as they browse listings. SecurityNational did not

have to hire outside developers or engage either vendor for help.

- **Ellie Mae Encompass** (loan origination system)
Borrower data syncs between the platforms, and custom logic allows SurefireCRM to identify Encompass contacts as current customers.
- **OptimalBlue** (pricing engine)
Current rates retrieved from Optimal Blue are automatically populated into SurefireCRM-generated single property sites.
- **MobilityRE** (real estate agent app)
Data and pictures from the MLS feed populate single-property sites and brochures.

All in all, SurefireCRM has helped SecurityNational hone in on the best marketing practices for its operational culture, and what's not to love about that?