

## Surefire Case Study

# TexasLending.com

**SurefireCRM helps TexasLending.com build relationships with thousands of Lone Star residents a month with just 35 loan officers**

### Company Profile

**HEADQUARTERS:**

Dallas, TX

**FOUNDED:**

2001

**WEBSITE:**

TexasLending.com

A division of Aspire Financial, **TexasLending.com** is a family-owned, direct-to-consumer mortgage lender serving customers throughout the Lone Star state with a local touch.

When CEO Kevin Miller launched TexasLending.com with just a few loan officers in 2001, he got the word out by placing a few modest ads in the Dallas Morning News. Today, TexasLending.com reaches thousands of customers monthly through lead, prospect and nurture campaigns powered by Top of Mind's SurefireCRM.

TexasLending.com is a direct-to-consumer lender that serves customers across the Lone Star state with a local touch. All 35 of its loan officers are centrally located in the firm's Dallas headquarters, where they apply a firsthand knowledge of Texas' unique lending laws and partner with local Realtors to better serve residents.

### Turning Leads into Loans

Creative content manager Fred Olorunyomi automates marketing for the entire TexasLending.com team — which,

with the help of SurefireCRM, is not as daunting as it sounds.

“We use SurefireCRM email workflows to stay connected with customers from the first phone call, where they’re really just gathering info, through the loan closing and for five years post-closing,” says Olorunyomi. “SurefireCRM makes it effortless to send information that is tailor-made for each specific customer, whether that’s a first-time homebuyer, someone who’s looking to buy their second home, or a homeowner who needs a cash-out refi.”



*SurefireCRM makes it effortless to send information that is tailor-made for each specific customer.*

Instead of spinning up nurture campaigns from scratch, Olorunyomi customizes award-winning content from SurefireCRM’s extensive library with TexasLending.com’s own unique branding. The SurefireCRM content library contains thousands of emails, landing pages, lead forms, dynamic videos and print collateral that can be customized according to the needs of the lender or individual loan originator. Content is even available in Spanish and can be co-branded with referral partner logos and contact info.

At TexasLending.com, the workflow for purchase prospects includes 31 touch points over the course of a year — but it usually doesn’t take that long. **The average TexasLending.com customer applies for a loan within 24 days of the start of the nurture workflow**, which includes a few task reminders assigned to the loan officer (such as periodic calls to check in

with the prospect) and more than two dozen automated emails that contain a mix of dynamic videos, educational materials and interactive content like calculators and games. A separate workflow for refi prospects includes 30 touch points over 320 days.



*Our open rate for in-process videos is almost 400%, meaning customers find them so valuable that they are opening them multiple times to watch them again or show them to a co-borrower.*

### **In-Process Video Campaigns**

Once a prospect applies for a loan, SurefireCRM begins deploying dynamic “in-process” videos that keep clients informed on what to expect as they move

through each step of the loan process.

“The in-process video campaigns keep customers tuned into what’s happening with their loan — even when they’re not on the phone with our sales team. The videos talk customers through gathering paperwork, disclosures, processing, underwriting and more,” Olorunyomi says. “Our open rate for in-process videos is almost 400%, meaning customers find them so valuable that they are opening them multiple times to watch them again or show them to a co-borrower.”

A run-of-the-mill purchase loan is anything but run-of-the-mill from the customer’s perspective. SurefireCRM gives applicants peace of mind with ready access to information throughout the loan process while freeing the TexasLending.com team to focus on sales activities.

## Staying In Touch

After closing, TexasLending.com uses SurefireCRM to keep in touch with borrowers and co-borrowers. Over five years, the post-close workflow sends monthly holiday greetings, neighborhood information, mortgage checkups and other emails that keep the relationship warm and create additional revenue-generating opportunities. SurefireCRM makes it easy for loan officers to keep track of the mortgages their contacts own and notifies LOs whenever market conditions make refinance opportunities favorable.

## Superior Ease of Use

In 2018, TexasLending.com opted to try another email marketing platform, but it took only a few months for Olorunyomi to make the switch back to SurefireCRM.

“Lenders have a lot of options when it comes to technology, and CRMs are no exception,” she explains. “While we experimented with another provider, we ultimately determined that SurefireCRM remains the best choice for us. Customizing content and automating workflows is easier to do and much less prone to technical glitches. In the very rare instance when problems do surface, the Top of Mind team always resolves them quickly.”

That ease-of-use is essential for Olorunyomi because it frees up time for her to focus on other responsibilities. She used to spend a lot of time customizing flyers with loan officer pictures and contact info and building co-branded single-property flyers for Realtor partners. Now, LOs can easily do that themselves, so Olorunyomi can devote more time to writing content for the lender’s social media accounts and blog — which in turn create new leads that flow right into SurefireCRM.

SurefireCRM’s fluid integration with popular loan origination systems (TexasLending.com uses LendingQB) seamlessly connects loan milestones with automated marketing activities, and Olorunyomi appreciates how Top of Mind offers flexible pricing that lets lenders select and pay only for the features they use.

## White-Glove Support

“I really like my support team. They’re always available, they answer emails quickly, they’re kind and helpful. If they don’t have a video that explains exactly how to accomplish a task, they send me detailed how-tos with screenshots. They’re adding content to their help button all the time, too — so they’re always thinking about new ways to add to the value of SurefireCRM.”