

# A Tale of Two Countries.

How MondoCRM was able to help a mortgage company scale and thrive into new cross-border workplaces.



Millennial Home Loans, LLC  
Low-To-No Down Payment Mortgage Loans

## A CASE STUDY

*A deep cross-platform expertise enabled MondoCRM to help an independent mortgage broker trade its outdated CRM platform for one that can scale with the company's growth.*



**MONDOCRM**

We facilitate insight.



## Executive Summary

MondoCRM knows that CRM systems are virtually useless until they are aligned with company objectives and processes.

We migrated MHL from *Act!* to *WiredContact*, converted the data and was able to bring vital new functionalities to bear and even cut technology costs:

- ✓ Converted *Act!* contacts, notes, histories, attachments & custom tables tracking Realtor referral activity
- ✓ Maintained familiar layouts and interfaces to reduce training and transition time
- ✓ Added native drip marketing app without the cost of additional software or plug-ins

## The Challenge

When MHL opened a second office in Norway, they encountered enormous tech infrastructure complexities between the two countries. *Act!* desktop support and maintenance costs were escalating and *Act!/Outlook* integration was all but lost. Every *Act!* upgrade caused profound disruptions to their government-regulated business processes. E-marketing became virtually impossible and the company couldn't even capture leads from website visitors without yet another costly plug-in.

## The Solution

Like crossing the River Styx, management was now faced with the daunting proposition of trading the only CRM platform they ever had for the unknown.

MondoCRM suggested *WiredContact Enterprise*. Since *WiredContact* was developed by former *Act!* engineers and consultants, the user interfaces and basic processes are strikingly similar. Any concerns about resistance from the sales reps were avoided.

*WiredContact* has a built-in utility to convert *Act!* SQL files so there was no need for 3<sup>rd</sup> party software to complete the often daunting task of migrating data. Mondo also leveraged *WiredContact's* native e-marketing module that works seamlessly without needing any 3<sup>rd</sup> party apps to get the job done. This is a key functionality for MHL that was rendered all but useless in their previous configuration and cost structure.

## The Impact

Unlike *Act!*, MHL has experienced a more stable platform and 100% uptime since the conversion. As a result, MondoCRM saved the company nearly \$1,200 in first-year maintenance costs. These savings have been invested in marketing, effectively helping the company scale faster than previously possible. MHL now focuses on originating and closing business, not IT headaches.

The company's new one-touch drip marketing campaigns gets it done. MondoCRM also integrated website lead capture forms that added a nice boost to their pipeline.

A company once stuck in the mud due to multiple IT and CRM platform issues now thrives and is growing at a rate previously unachievable.



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## The Client Quote

*"Mark, I just ran my first report. This system is f@#&ing awesome! It just does what I want it to do."*

## The Key Takeaways

1. With MondoCRM on point, change doesn't have to be expensive, disruptive or scary.
2. Data conversions can be fast and painless.
3. Our clients can both increase functionality and save money at the same time.
4. Powerhouse CRM performance no longer requires massive IT & networking infrastructure.



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