CRM SYSTEMS -
WHICH ONE IS RIGHT FOR YOU?

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So you may have decided you want to use a CRM (customer relationship management) system to help you keep track of all your customers and remind you when to contact them - or even do it for you.

But how do you know which one is best for your size and type of business? One of the key things to bear in mind, of course, will be how many users you will have. Are you an independent mortgage broker working on your own or part of a larger firm?

We've put a cheat sheet together of the main systems available to help you to decide what would best suit your business in terms of functionality and ease of use. The first four are mortgage specific while the last two are more general CRM solutions you could consider.

EKEEPER

This is one of the main mortgage, lending and banking CRM systems. It's clear and easy to use, offering such facilities as case tracking, client management, commission, compliance, documents and reporting. Its comprehensive information bank provides you with timely prompts to make sure you contact your clients at the right time. Having been developed by mortgage brokers, one advantage of this system is that it's based on industry knowledge so it's more likely to be relevant to your specific needs.

BRIGHT OFFICE

Bright Office is a cloud based CRM system. Its main advantage is its flexibility in that it's suitable whether you're a new or established broker as there are different versions of the software. It will help you add new products such as asset finance, short term lending, bridging, loans and invoice factoring but will also enable you to diversify into new markets. One particularly good feature is the powerful reporting over multiple database fields. You can also customise your software and create personalised documents. If you're just starting out in the world of CRM, Bright Office can be a good option as it offers cost effective monthly payments so you can expand as your business grows.

INTELLIFLO

Intelligent Office (iO) from Intelliflo is web-based mortgage broker software and represents another of the 'big boys' of CRM systems - used by over 2,200 leading firms. One of the main advantages is that it is a single integrated 'eco-system' and gives you one place where you can efficiently manage your entire mortgage process. Brokers also find it useful because it is compatible with third-party portals like MortgageBrain, Trigold and iPipeline. It can underpin your sales process, helping you add prospective leads, converting them to clients and completing fact finds. The client portal, combined with Salemove, enables you to meet your clients virtually in real time, share documents and communicate via text chat or video.

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MORTGAGE BRAIN

The Key from Mortgage Brain offers a comprehensive sales, CRM and case management system for mortgages, insurance, life, loans and other financial products and is used by larger brokerages. It integrates with Mortgage Brain Classic, Mortgage Brain Anywhere and MTE which reduces the amount of re-keying of data you'll have to do. As it's a cloud based you can be confident that all your information is securely backed up. The client portal with online fact find for you and your clients is a major selling point. As well as offering a free one-month trial, they also offer a wide range of webinars, videos and support guides to help you get to grips with all the features.

SALESFORCE

Without doubt, this is one of the biggest names in CRM. It offers applications for small, midsize and enterprise organisations and is known for being flexible and easy to use. You don't need an IT expert to manage the set-up - simply log in and start connecting with your customers. The software is highly efficient too, integrates with other systems and is particularly good for marketing and sales.
As Salesforce is a market leader, they are a huge company and there have been some comments that getting hold of support can sometimes be hard. Brokers have also said that as there are so many different elements, it can be a slow learning curve but the extra functionality is worth it in the long run. It is on the expensive side and may be bigger and more sophisticated than you need if you're a smaller brokerage.

HUBSPOT

Hubspot offers a free CRM package which will hold all your contacts in one central place. It's got everything you need to organise, track and order your leads. Brokers comment that the notifications and follow up reminders are really useful. The email templates are also easy to construct and distribute. All the inputting of contact information and data gathering is fully automated which will save you a vast amount of time. Hubspot is particularly good for small businesses in that you don't pay for what you don't use. There are no limitations in the number of users or number of contacts. There is also very good chat support.

With all these systems, the best way is to try them and see what's right for your business so why not have a look around their websites, book a free demo and start experimenting.

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