



FLG

Customer success story:

how NM Finance sped
up their processes using
FLG's CRM software

Norwich-based mortgage and protection broker NM Finance are specialist independent lending experts for homeowners and developers. Established in 1998, they have many years of first-hand experience with self-build and commercial property development, enabling them to find the best deals for every type of client.

We spoke to Mat Foulkes, Operations Director at NM Finance, who explained why they chose FLG's CRM to help them speed up their processes and deliver the best possible service for their clients:

- Real-time data from website leads automatically distributed to advisers
- Completed mortgage packs returned in as little as 90 minutes
- Automated client communication throughout the mortgage journey
- Streamlined processes and time saved on admin to focus on helping clients.



The search for a new CRM system

NM Finance had been using a bespoke VBScript-based CRM, which they hosted and managed themselves for many years. When Mat joined the company in 2019 to support the smooth running of the business in regard to IT, systems and technical processes, he was given the core objective of finding a new SaaS CRM system with everything under one roof. It needed to be web-based, easy to implement, and crucially it had to offer an excellent capability for enhanced client collaboration throughout the mortgage journey.

They began a CRM procurement project based on a set of decision-making parameters, including:

- client experience
- internal user experience
- wider system integration
- ease of implementation
- data migration
- ongoing management.

After a vast amount of market research and conversations with partners in the IFA and mortgage space, 5 or 6 different CRM systems were identified as ones that might make the cut. Several demos and fact-find exercises later, they decided that FLG, recommended to them by an IFA partner, was the best fit. They were impressed with how closely FLG's functionality aligned with their requirements, the client collaboration they could achieve, and the fact that we're a UK-based company with a friendly and accessible support and implementation team that's only ever a phone call away.



"Sarah, our Onboarding and Support Manager, was instrumental in supporting us and made the whole experience so easy. From the initial onboarding workshops to ongoing business as usual, Sarah and her team have been really helpful and always pick up our requests and action them quickly. It's been a really positive experience."

As a Concierge customer, NM Finance benefitted from having their complex set-up with multiple workflows and associated logic-based tasks completed on their behalf, as well as ongoing adjustments to refine and improve their processes. One example was when they wanted to duplicate mortgage cases and copy over additional fields containing data from online forms to create leads for protection products. Our team took this objective and was able to deliver it as off-the-shelf functionality for all FLG customers – a real data entry time-saver when creating linked leads for complementary products.

Delivering the best possible service

In March 2020, the uncertainty felt by the nation as the UK went into lockdown meant that business was quiet for a few months. Soon after, there was a widespread feeling that business must go on, clients were keen to continue with their plans, and people wanted to buy and sell their houses as quickly as possible in order to benefit from stamp duty tax relief. Working from home with FLG in place, NM Finance had the perfect set-up to assist clients quickly and efficiently as the sense of urgency intensified around the initial stamp duty holiday deadline.

How staff and clients are reaping the benefits

Since using FLG, NM Finance has experienced increased productivity and a large reduction in end-to-end case timelines, which has been a huge plus for clients. Thanks to automated communication, clients are kept in the loop at every stage throughout the mortgage journey, to confirm their pack has been received or that a mortgage offer has been made for example, which is incredibly reassuring for them.

“Ultimately, FLG allows us to work more efficiently by helping us analyse capacity, assign tasks automatically and turn things around as quickly as possible. It has streamlined our processes and saves us time on admin so we can focus more on helping our clients.”

Armed with the additional functionality they needed from their new CRM, as NM Finance looks to the future it will continue to deliver a top-class service to clients and expand its internal funding and services in its niche product areas. They also plan to set up an integration with a data visualisation tool that will use [FLG reports](#) to drive dashboards displayed in the office to view progress at a glance.

When asked if he'd recommend FLG to other businesses, here's what Mat had to say:

“We would certainly recommend FLG to other businesses. It's a really powerful system that can do a huge amount, but it's also really intuitive and easy to use.”

“The set-up for remote working with FLG was effortless. It has really simplified and streamlined our client journey, saved time across the board, and has given our clients a much more positive experience throughout the mortgage application process.”

NM Finance prides itself on its client focus, delivering its core values of positivity, teamwork and inspired solutions to find answers to its clients' tricky objectives. As their great reputation precedes them, they receive a lot of new business from renewals and referrals from existing clients.

With their previous system, new lead data was collected from their website, manually emailed for review, and distributed amongst the team of advisers. Now, real-time leads land in FLG and are automatically forwarded to the relevant advisers to be followed up, with full management information available to monitor the performance of leads from multiple sources.

Another process change that's speeded things up is the move to online forms. Previously, mortgage packs and requests for documentation were sent out via post. Now that packs are sent out electronically with eSigning functionality, clients really value how easy it is to provide information and some are returning completed packs in as little as 90 minutes. This allows advisers to move much more quickly to help clients meet their individual deadlines.

“Previously we sent mortgage packs out in the post, so a three to four-day turnaround was best-case scenario.

Now that we use FLG's online forms, some clients are getting packs back to us in as little as 90 minutes, which is fantastic!

“Ultimately, FLG allows us to work more efficiently by helping us analyse capacity, assign tasks automatically and turn things around as quickly as possible. It has streamlined our processes and saves us time on admin so we can focus more on helping our clients.”

Mat Foulkes,
Operations Director



Why do our customers choose FLG?

Easy-to-use CRM

Manage 100,000s of leads

Automate processes

Tailored to your sales process

Personal, hands-on setup

Free phone and email support

UK-based, in-house teams

Securely hosted in the UK



**For more information or
to get a free demo visit
getflg.com**