IN PROGRESS

LendSure Mortgage Corp.

Overview

LendSure Mortgage Corp. + EMS consulting

Since their inception in 2015, LendSure Mortgage has grown into one of the largest privately held wholesale ,mortgage companies serving the US. LendSure Mortgage needed a sales and service platform that would scale with their hyper growth and looked to EMS Consulting to integrate their Encompass LOS directly into Salesforce. By Leveraging EMS Consulting's Digital Mortgage Solution which is built on top of Salesforce CRM and Communities, EMS gave LendSure the ability to complete the loan application online and upload all the pre-qualification documents as necessary.

Goals

▸ Community based POS built on Salesforce to allow their broker network to complete the loan application process on behalf of their consumer and transfer pre-qualification forms/documents to LendSure underwriters

▸ Enhanced collaboration and visibility to the loan process with case submissions/requests, loan status and outstanding tasks, providing a robust self service knowledge article search

▸ Utilize Salesforce workflow automation and case management, leveraging a bi-directional integration between Encompass and Salesforce integration

▸ Enhance front-end underwriting and pre-qualification fields to capture necessary data needed in the loan application process for all loans, including Non QM Loans

▸ Integrate Optimal Blue & Black Knight Property history forms directly into Salesforce to house all data in Salesforce, and provide underwriting the proper insights for the loan process

Solutions & Key Integrations

Upgrade to Sales & Service Cloud

Digital Mortgage (POS)

Optimal Blue Pricing Integration

Encompass Connector *(Pre-built API Integrations for Bi-Directional Updates)*

Black Knight Integration (Property History)

Future State

▸ **Centralized, Mobile-Friendly Solution:** One platform that drives all touch points and acts as the system of engagement for the broker network and all divisions of LendSure Mortgage

▸ **Integrated LOS:** Streamline processes and reduce manual redundancies with bi-directional Encompass integration with Financial Services Cloud

▸ **Digital Mortgage POS:** Enhance collaboration and digital experience allowing the Brokers to complete loan applications online, use knowledge articles for helpful information, and have complete visibility in the loan pre-qualification process

▸ **End-To-End Automation:** Fully automated process from pre-screen to close leveraging integrations with Optimal Blue's pricing engine and Black Knight property history data

▸ **Visibility and Reporting Capabilities:** More efficient data analysis, analytics, and dashboards with the ability to track loan status' in real time