



Salesforce Integration for Lending & Mortgage Company

PROJECT DETAILS

 Custom Software Development

 May. 2021 - Ongoing

 \$50,000 to \$199,999

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PROJECT SUMMARY

A lending and mortgage company was looking to migrate their sales process and operations into a Salesforce platform, so they engaged with SP Tech for their Salesforce and software development expertise.

PROJECT FEEDBACK

Thanks to SP Tech's cost-effective solutions, the company is able to save over \$300,000 USD in development costs, and complete several projects in a short period of time. According to the client, one of the team's biggest strengths is their communicative and receptive approach to project management.



The Client


Introduce your business and what you do there.


I'm the president of MyLendingPal and we're a lending and mortgage company.


The Challenge

What challenge were you trying to address with SP Tech?

We were trying to migrate a lot of our sales and operations into a Salesforce platform, so we needed to consult with a Salesforce expert who could visualize the solutions that we need, and implement them into Salesforce at a reasonable cost.

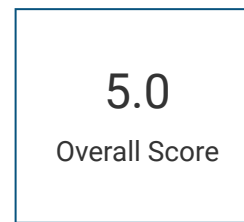
 **Ricky Merchant**
President, MyLendingPal

 **Financial Services**

 **1-10 Employees**

 **Suwanee, Georgia**

CLIENT RATING



Quality: 5.0



Schedule: 5.0



Cost: 5.0



Would Refer: 5.0





The Approach

What was the scope of their involvement?

SP Tech is providing us with Salesforce integration. We first started with a call to scope out the project, talk about their services, and how their team works. After that was done, they set up a daily scrum meeting with me every day at 12:30 pm to go through the process.

From there, we started the development that involves the user testing area and quality assurance. This is to ensure that the iteration that they're working on is working well before it gets deployed into production.

The process then gets repeated for every project over the course of our engagement.

What is the team composition?

We work with a project manager, three full-time developers, and two QA engineers.

How did you come to work with SP Tech?

I found them on Upwork. I interviewed several different companies that reached out to me and ultimately chose SP Tech because they were closer to my office, and I found their pricing per hour and per developer to be very reasonable.

Moreover, as far as the solutions that they built in the past and what they showed me, everything looked really good. They were able to deliver the results I wanted from the initial project we gave them and it was clear that they were the right people for the job.

How much have you invested with them?

So far, we've spent \$150,000 USD.





What is the status of this engagement?

The ongoing partnership started in May 2021.

The Outcome

What evidence can you share that demonstrates the impact of the engagement?

In the timeframe that we started working together, we've completed six individual projects, which isn't the number you would normally complete in such a short period of time. They move very quickly and they've saved us \$300,000 USD for development work — which is a lot compared to the average rate for the same type of work.

How did SP Tech perform from a project management standpoint?

SP Tech has a really good project management process established and a great system built on ClickUp. They essentially gave me access to it so I can keep track of the project's progress and organize the development.

We mostly talk through Microsoft Teams and we use Slack internally.

What did you find most impressive about them?

One of their biggest strengths is they're able to communicate with me every day, and I believe that's one of the reasons why we ended up being more successful than others. The management is very transparent and we're able to interact in a meaningful way.

Are there any areas they could improve?

Personally, I don't think there's anything negative about working with them so far, so I don't have any complaints.





Do you have any advice for potential customers?

I don't know if SP Tech does this for everybody, but I would highly suggest setting up daily phone calls with at least the project manager. Make sure you check the development often and familiarize yourself with their platform.

