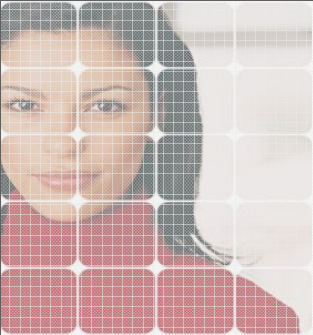


# Leading Mortgage Lender Chooses World Class CRM from Zanibal



*“The ability to leverage the insight and understanding of every customer's value at all service points has enabled us to deliver outstanding business performance at unprecedented low costs.”*

--- Kevin Smith  
Chief Marketing Officer

**Industry**  
Financial Services

**Geography**  
North America

**Challenge**  
Microsoft Access could no longer handle the increasing sales lead volume that Avalon Mortgage Lenders (AML) was experiencing as the company grew. AML needed a cost effective solution that could be customized to match its complex sales process.

**Solution**  
AML selected an on-premise CRM application from Zanibal over CRM software from Siebel, GoldMine, and SalesLogix. The solution was implemented in less than two months, customized in-house, and easily integrated with internal databases and systems.

**Results**  
Over one thousand worldwide users better track and manage sales activities and marketing campaigns, giving productivity a 40 percent boost. The solution easily handles AML's large lead volume, preventing valuable leads from falling through the crack

## Company's Success Outpaces Sales Tracking System

In recent years, subprime mortgage lending, which makes funds available to borrowers with less-than-perfect credit, has become the fastest rising component of the mortgage industry. Since it was founded in 1996, Avalon Mortgage Lenders (AML) has grown into one of the largest subprime lenders in the world by offering customers the most competitive rates in the industry. The company now originates over 12,000 loans monthly with an average monthly lending volume that exceeds \$1 billion.

Early in AML's history, the sales team tracked new leads and prospects in Excel spreadsheets. As the company grew, the team switched to Microsoft Access to manage increasing lead volume, but AML's success soon outgrew that system, too. "The incredible volume was too much for Access to handle and was creating troubling inefficiencies that resulted in some leads being called twice while others were ignored," explains Kevin Smith, Chief Marketing Officer at AML. "And to make matters worse, we were not able to easily share customer information as prospects moved through the pipeline. Our customers and our salespeople work around the world and around the clock, so seamless coordination is critical."

AML decided to purchase a CRM solution to ensure that the company both capitalized on its continually increasing lead volume and also retained its critical focus on building strong relationships with prospects and customers, which is critical to success in the financial marketplace.

## Dynamic, Global Market Warrants Flexible CRM

In addition to better tracking and sharing capabilities, AML sought a solution that they could easily customize. "We have a complex selling process that requires more flexibility than most out-of-the-box CRM solutions can provide," says Smith. "In fact, we found that most solutions that were specifically targeted to the financial services industry could not give us what we needed without some serious tweaks."

AML also did not want to pull IT resources away for too long to focus on a CRM implementation, so ease-of-installation and minimal ongoing maintenance requirements were important criteria as well.

The company evaluated solutions from companies including Siebel, GoldMine, and SalesLogix but was impressed with Zanibal. The deal was sealed during a free, 30-day trial of the on-premise CRM solution. "We tested the functionality that was important to us and customized the solution to match our sales process, all within the first 2 weeks"

*“Zanibal helps us process leads much more efficiently than we did before and we estimate that productivity is up 40%. Our customizations put all the information that our sales team needs no more than two clicks away.”*



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### **Zanibal Boosts Productivity and Streamlines Lead Management Processes**

Zanibal was up and running at AML in less than two weeks. In the first two months alone, 50 sales users successfully tracked and managed more than 15,000 leads in Zanibal. Today, more than 1000 AML employees around the world are using Zanibal’s Enterprise Edition to better track team and individual sales activities as well as marketing campaigns. “Zanibal helps us process leads much more efficiently than we did before, and we estimate that productivity is up 40 percent,” says Smith. “Our customizations put all the information that our sales team needs no more than two clicks away.”

Zanibal facilitated integration with internal systems—including a proprietary software application built on top of an Oracle database—putting new and updated customer information such as account transactions, balances, and contact information within easy reach of sales teams using Zanibal. AML quickly and easily achieved its various integration projects through a combination of in-house AML resources, a third-party tool, and Zanibal’s professional services. “Our ability to do some of our own integration work underscores a key value proposition of Zanibal—it’s very easy to install and maintain, and even integration requires few, if any, outside resources,” says Smith. “Because it’s so tightly integrated, our busy teams can get a complete view of the entire customer experience simply by logging into Zanibal.”

Due to the sensitive nature of financial information, AML also needed tight control over security permissions and functional privileges. Zanibal allows AML to control data access by setting user, department, or role-based data security and sharing privileges, ensuring that information is not improperly accessed or shared. For example, sensitive data that is used by the compliance and institutional sales groups are shielded from users in other AML groups. Even joint venture partners have restricted access to Zanibal, giving them access to limited and very specific information and activities.

“Flexibility, security, scalability, ease-of-use, low-maintenance—Zanibal has it all,” summarizes Smith. “Why would we use anything else?”