



HOUSEMAX'S EXPLOSIVE GROWTH: TRIPLING LOAN VOLUME WITH LENDINGWISE CRM & LOS

The success story of HouseMax, a private lender that achieved explosive growth by tripling in size and loan volume, offers valuable insights into how leveraging the right CRM & LOS system can transform lending operations. In this case study, we'll explore the challenges faced by HouseMax and how the implementation of LendingWise CRM & LOS led to their remarkable growth.

Challenges Faced by HouseMax

- Before adopting LendingWise CRM & LOS, HouseMax faced several challenges, including:
- Operating without a software system, leading to inefficiencies and difficulty in tracking loans and borrower information.
- Inability to keep borrowers updated in real-time, causing frustration and potentially losing deals.
- Manually generating documents such as loan applications, term sheets, and disclosures, which was time-consuming and error-prone.
- Lack of automation, requiring extensive manual effort to manage the loan process.

The LendingWise CRM & LOS Solution

HouseMax turned to LendingWise CRM & LOS to overcome these challenges and streamline their operations. The following are some of the key benefits they experienced:

- **Unified Team with Cloud-Based System:** LendingWise's cloud-based CRM & LOS provided a unified platform for HouseMax's entire team. This allowed them to easily collaborate, track loan progress, and share information in real-time, leading to improved efficiency and communication.
- **Workflow Steps and Smart Logic:** The LendingWise system provided simple-to-follow workflow steps and smart logic for required documents, enabling HouseMax to streamline their loan process and minimize manual intervention.
- **Remote and Offshore Team Expansion:** With LendingWise's cloud-based solution, HouseMax could easily onboard remote workers and even low-cost offshore employees for processing, underwriting, and capital markets loan trading. This flexibility allowed them to scale their operations quickly and cost-effectively.
- **Enhanced Borrower Communication:** LendingWise CRM & LOS enabled HouseMax to keep borrowers updated in real-time, improving borrower satisfaction and increasing the likelihood of successful loan closings.
- **Automation and Document Generation:** LendingWise's automation features and document generation capabilities eliminated the need for manual document creation, saving time and reducing the risk of errors.

The Results: Explosive Growth for HouseMax

By adopting LendingWise CRM & LOS, HouseMax experienced significant growth, tripling in size and loan volume. The powerful features and capabilities of LendingWise's system allowed them to overcome their challenges, streamline their processes, and scale their operations rapidly.

In conclusion, HouseMax's success story demonstrates the transformative power of LendingWise CRM & LOS. By leveraging LendingWise's advanced features, lenders can overcome common challenges, improve efficiency, and achieve explosive growth. Experience the benefits of LendingWise CRM & LOS and propel your lending business to new heights.



"We have grown our business beyond our expectations, with a lot of credit to the LendingWise platform & their dedicated team. They are very receptive to new ideas, feature improvements to handle the evolving lending industry's needs."

• Jeff Fecher – CEO of Housemax •