



## CUSTOMER SUCCESS STORY

### PrimeSource Mortgage Branch Manager Finds Ideal Workflow Solution with PushMX Software



#### Business Challenge

PrimeSource Mortgage is a national originator that was founded in 1992. Headquartered in Roswell, New Mexico, PrimeSource has 27 branches located in five states across the country. In addition to managing the corporate office, Mark Chavez manages a branch that is also located in Roswell. Mark Chavez's day-to-day operations experience at both the corporate and branch level made him the perfect candidate to identify and secure a scalable workflow solution that PrimeSource could cost effectively roll out to all its current and future branches.

"We wanted to be proactive instead of reactive," Mark Chavez explained. "PrimeSource decided to search for a workflow solution because we found that we were fighting to strike a balance between addressing priority loans while not allowing the other loans in the stack to fall behind."

Prior to implementing PushMX, the Roswell branch's pipeline tool was an Excel spreadsheet containing the status of every loan. However, this method was limited by the timeliness of the information and in order to update it, loan officers were required to take 30 to 45 minutes of their day and focus on entering new information into the spreadsheet. This took away precious time that could be used to develop new business or service existing customers.

Incorporating a workflow solution into the business model would allow PrimeSource to not only meet the needs of all of its current branches, but it would also serve as an added value for new branches. "The network is continually growing and we're always looking for new benefits to being a part of PrimeSource," Crystal Chavez, Branch

Services Manager, said. "A workflow solution would allow the company to have another innovative way to address some of the concerns that all mortgage originators face."

#### Implementing PushMX Software

Mark Chavez had been conducting an extensive search for a workflow solution when he learned more about PushMX Production during the PrimeSource annual conference and he found that the solution addressed all of the goals he and the company wanted to accomplish. "I visited PushMX Software's Web site and watched the online demonstration for about two minutes and at that point I was ready to write a check," Mark Chavez said.

PrimeSource's business model of a corporate office and a network of branches was also compatible with PushMX's "train the trainer" approach. PushMX's Professional Services group traveled to Roswell to learn about the company's workflow processes. Based on their current methods and recommendations made by PushMX, the group created and installed a solution that was tailored to fit the needs of PrimeSource's environment.

"We believe in efficiency and based on that, we've found that the best way to implement PushMX Production at a large company such as PrimeSource is to conduct the installation and training at corporate headquarters," Pat McGale, Director of Professional Services for PushMX Software, said. "We train the trainer and that way the company can deploy PushMX applications to their branches in the way that meets their unique needs. PrimeSource knows their business model better than anyone and this method puts the control in their hands rather than with a third party."

#### Organization:

PrimeSource Mortgage

#### Location:

Roswell, New Mexico and 27 branches in five states

#### National and Virtual Exposure:

Ability to close loans in 48 states

#### Specialization:

Mortgage brokerage

#### Applications:

Loan origination and processing

#### Solutions:

PushMX™ Production

"The 'train the trainer' approach of PushMX has allowed us to offer additional value to our branches. Now we can directly provide the training and support that our branches need, which enables us to increase our one-on-one contact. The branches love it and it's been a huge benefit all the way around."

– Crystal Chavez, Branch Services Manager



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– Mark Chavez,  
Branch Manager

*"Now I'm able to review the pipeline when I come in and see what needs to be done. I can see instantly where the bottlenecks are and determine if I can step in and fix the problems. Just that incremental change greatly improves our productivity."*

– Mark Chavez,  
Branch Manager

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## Customer Success Story – *continued*

The Professional Services group was able to train users at the headquarters of PrimeSource in just two days and in turn the company rolled the solution out to about half of its 27 branches. Kathleen Curtis, Coordinator of Branch Services, trains two branches every week via conference call. The branch managers set up the trainings based on their availability and sign up for additional sessions as needed. The flexibility and consistency of the weekly training sessions allow Curtis to ensure that all questions are addressed and make sure that all users have a clear understanding of how to use PushMX Production. "It was a big help for PushMX to train me and now branches contact me directly for all training and support questions," Curtis added. "One branch had issues and once we figured out the solution, we were able to include it in the training sessions as a troubleshooting component."

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### **Immediate Return on Investment**

At the corporate office, Crystal Chavez has been able to see the change occur each time that a branch installs PushMX Production. The change not only impacts the branch as a whole, but individual employees also see an improvement in their work life.

"I helped get the installation started at one of our branches in Farmington, New Mexico," Crystal Chavez recounted. "I followed up two days later and the branch owner was amazed at the change in attitude of his new loan processor. Now she's happy and excited to be at work every day and I didn't do anything; it was PushMX. The software empowered her as an employee because it helps

manage her time and loan activities more efficiently. Also, people can use PushMX Production to view their pipeline rather than coming to her with all types of questions, which frees her up to concentrate on processing loans."

The Roswell branch has been using PushMX Production for about two months and they have already benefited from an increase in productivity. For instance, PushMX Production has been configured to automatically send out emails to all applicable parties regarding loan status and remaining tasks required for each loan. Such automation capabilities have given back valuable time to the loan officers – time that can now be devoted to originating new loans.

PushMX's 24/7 pipeline visibility and automatically generated management reports have allowed the management team not only to access information on every loan at any point in the origination process, but the ability to make informed and timely decisions. "To me, that seems to be the biggest benefit to our operations," Mark Chavez commented. "Now I'm able to review the pipeline when I come in and see what needs to be done. I can instantly see where the bottlenecks are and determine if I can step in and fix the problems. Just that incremental change greatly improves our productivity."

"It's user friendly, so the branches are all catching on really quickly," Crystal Chavez said. "Everyone's seen a significant difference in the level of communication. Now branch employees can communicate without interrupting each other's day, yet still keep everything on time and organized."

PrimeSource is continuing to roll out PushMX Production to additional branches and plans to have all of its branches using PushMX within the next quarter. The company is using the feedback from early adopters to establish a workflow process comprised of the best practices that all of its employees can use to maximize their time every day.



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