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■ **FOCUS**
.....
AUTOMATED LOAN ORIGINATION

.....
■ **INDUSTRY**
.....
RESIDENTIAL MORTGAGE BROKERAGE

PUSHMX SOFTWARE CUSTOMER SUCCESS STORY

Allied Branch Office Doubles its Loan Volume, Cuts Administrative Costs and Reduces Average Workday by Two Hours Using PushMX with Calyx® Point®

**Allied Home Mortgage
Capital Corporation**

"Since implementing PushMX, we've doubled the number of loans in our pipeline and reduced our average workday from 10 hours to 8 hours. We're so happy with PushMX that we are now referring it to other Allied branches whenever we can."

-- Amanda Botsch, Branch Processing Manager

Organization:
Allied Home Mortgage

Industry:
**Affiliated Branch
Mortgage Company**

Applications:
**Loan Origination
and Loan Processing**

Solution Set:
**Calyx® Point® Software
integrated with PushMX™**

PushMX Products Used:
Core Module

BUSINESS CHALLENGE

In the fast-paced origination business, there often aren't enough hours in the day to keep track of all the details of the job. Clear communication and organization are important to ensure that nothing gets lost in the day-to-day shuffle or buried on someone's desk.

In this environment, it's difficult to leave the job at the office, much less take time off for a vacation, noted Amanda Botsch, processing manager for an Allied Home Mortgage branch office.

"Like other Allied branches, we have a lot of flexibility on how we organize our business," Botsch said.

"Traditionally, we used paper checklists in each file to make sure everything was getting done on time. It was working fine and we rarely lost a loan. But we were working ten hours or more every day to get everything done."

Although Botsch's branch exceeds the industry's track record in loan completion, the office wasn't growing as fast as they wanted. They had been using Calyx Point for five years to automate the loan origination side of the business, but found workflow and pipeline management to be filled with time-consuming details.

"Our normal 10- and 12-hour days were taking a toll on us," Botsch admitted. "We were desperate for productivity and pipeline tools to help us become more efficient with our time."

WHY PushMX?

In early 2005, Botsch's office heard about PushMX from another Allied branch that was very satisfied with PushMX. From this recommendation, Botsch's manager made the decision to integrate PushMX's productivity and workflow management functions into Calyx Point.

The time savings were immediate.



"PushMX and Calyx Point work so well together. We don't have to input data twice. All the information from Point is automatically imported to PushMX."

"Now we have a single loan pipeline in plain sight within PushMX on our computers. There's no more wasted time shuffling through stacks of files and document after document, or trying to find a file buried on someone's desk."

"We're so happy with PushMX that we are now referring it to other Allied branches whenever we can."

"It's a lot easier to look at PushMX to see what needs to be done rather than combing through a loan file," Botsch said. "I no longer have to get up every few seconds and ask someone a question. When we talk to a title company or lender, we note the conversation in PushMX with all the pertinent details."

"PushMX is a huge timesaver for our loan officers. Now they have more time to talk to more borrowers and close more deals."

Botsch found that even loan officers who weren't accustomed to using computers every day adapted easily to PushMX and saw its immediate value.

"PushMX is so easy to use. The basic functionality involves just clicking on the borrower's name. It's so much easier to look up a loan and see what needs to be done from PushMX than have to ask me what the next step is or get up and find the file."

Peace of Mind: Priceless

The time savings gained from PushMX have enabled the branch manager and loan officers to work with a greater number of prospective customers. In just a few months after installing PushMX, this Allied branch has expanded its business well beyond all expectations.

"Since implementing PushMX, we've doubled the number of loans in our pipeline and reduced our average workday from 10 hours to 8 hours."

Botsch notes that 95 percent of their business is now FHA loans, a market that has led to repeat business and referrals. "The best way to get referral business is to help someone who never thought they could buy a house, with just \$1,000 down," Botsch said. "What better testimonial is there than that?"

With the influx of new and repeat business and a shorter workday, Botsch notes a newfound peace of mind within her company. 10- and 12-hour days are less common, and vacations aren't just the stuff of dreams any more.

"As the senior processor, I find it difficult to tear myself away from the job," said Botsch. "But this summer I took a week's vacation and realized that PushMX had given me a greater peace of mind. By being able to refer to my notes in PushMX, the others in my office had phone numbers, tasks, and deadlines at their fingertips, so they were easily able to carry on and do a great job while I was away."

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BENEFITS TO THE ORGANIZATION

- Integrates easily with Calyx Point - no need to change origination software to add pipeline management, workflow and other powerful functions
- PushMX is extremely easy-to-use for everyone in the office including loan officers, processors, management and administrative people
- Organizational management and workflow within PushMX reduce processing workload by two hours per day, and as much as ten hours per week
- A single pipeline dashboard view displays status on all loans in process
- For a very modest cost, PushMX layers on additional powerful features to Calyx Point, making Point more functional and more useful to everyone
- Added productivity frees up time for branch personnel to pursue new business

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