

# COMPANY CASE STUDY

**Dan Sugg, CMB**  
Chief Lending Officer



## Growth in Numbers

- Pre-approvals up 200%.
- Up 70% in disclosed loans.
- 40% increase in funding.

## Daily Accountability

The only mortgage CRM built for credit union teams.

## Weekly Benchmarks

Includes the #1 sales bootcamp for mortgage loan officers.

## Monthly Evaluation

Managers receive weekly progress reports and monthly evaluations of their team.



Schedule Demo

## Objectives

In this market, when having to work 4x to achieve the same results, it's paramount to have a coach train a verified system to measure team activity. This program and CRM is an investment in your sales team that will help retrain, refocus and retain your salesforce. - **Dan Sugg**

## Results

Since starting the 90-Day Sales coaching and accountability program we have seen a significant rise in overall accountable activity in our loan officers. From purely a numbers game, we have seen major increase in our results (see above). Given that we are only in our first 90 days, I believe the real value will be over the next 6-9 months with the systems now fully in place. - **Dan Sugg**