

Eustis Mortgage Chooses Usherpa Smart CRM

Executive points to significant benefits stemming directly from the Usherpa relationship.



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/EINPresswire.com/ -- [Usherpa](#), the real

estate and mortgage industry's original enterprise CRM technology, has published a new case study in which executives at Eustis Mortgage speak to the importance of marketing automation in a changing mortgage market. The lender has been a Usherpa client since 2007. About 80% of the Eustice Mortgage's loan officers use Usherpa's automated in-process marketing.

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Stephen Barton, SVP National Retail Growth, Eustis Mortgage

“There are two things I look for in a CRM. First, it must be a turnkey system,” said Eustis Mortgage Senior Vice-President for National Retail Growth Stephen Barton.

“Second, all of your outgoing communication needs to be relevant to the customer. You need content that they will either click on, watch or read. And you need to deliver it in any way your customer wants, including text.”

Eustice counts on Usherpa for both fresh marketing content and marketing automation capable of delivering it without making loan officers do the work. Barton says the software must be configured to allow for different borrower journeys for its various loan products and to set

the standards that will guide in-process marketing and help LOs maintain the relationship with the borrower after the loan is closed, but after that the software basically runs itself. Much of this work Barton's team can do on their own, but occasionally Eustis Mortgage will reach out to Usherpa's team for support.

“One of the things I love about Usherpa and the reason I will never switch is that even though we're not one of the largest lenders, when we need assistance or want to make a change, our partner always hears our call for help and answers it,” Barton said.

Usherpa was founded by Dan Harrington in 1995, a former loan officer who needed a better tool for marketing home loans. It has since evolved into the industry's most sophisticated, cloud-based CRM/Marketing Automation system. Now referred to as the Relationship Engagement

Platform, Usherpa's smart CRM software has helped thousands of loan officers stay connected with partners and clients. Usherpa's Smart CRM was named to the prestigious HousingWire 2021 Tech100 list. It was the only company to make both the mortgage and real estate lists of top companies.

"It's not about price, although the price is great; it's not about all the features, but the features are fantastic," Barton says. "Usherpa is better than anybody in the market for the simple fact that I can call and get ahold of the people who care about us winning. For us, that's fantastic."

[Download the new case study here](#). Find out more about Usherpa's Smart CRM by visiting the company online at <https://usherpa.com/>, by calling (303) 740-5710 or via email at info@usherpa.com.

About Usherpa

Usherpa has been serving the mortgage and real estate industry since 1995, when it was founded as Media Center LLC. The company offers a powerful, easy-to-use marketing and CRM platform backed by gold-standard customer support and robust training to help Loan Officers and Real Estate Agents make the most of its effortless, fully-automated CRM. Usherpa users are empowered to build and maintain relationships with prospects, past customers, and business partners, resulting in increased repeat and referral business. Visit <https://usherpa.com/> to learn more.

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