

# FundingSearch Launches CRM Software Built Specifically for Commercial Finance Brokers

*New platform gives brokers one pipeline for asset finance, invoice finance, bridging, commercial mortgages and merchant cash advance, matched to lender appetite*

SHEFFIELD., UNITED KINGDOM, June 15, 2026 /EINPresswire.com/ -- FundingSearch, the Sheffield-based fintech platform connecting SME borrowers, brokers and lenders, has launched its [commercial finance broker CRM software](#), a platform built to replace the patchwork of spreadsheets, inboxes and generic CRMs that most commercial finance brokers still rely on to run their business.

Unlike general-purpose CRM systems adapted for finance use, FundingSearch's platform is built

around the realities of commercial lending. It handles the full broker workflow, from first enquiry through to completion, across five core asset classes: asset finance, [invoice finance](#), bridging finance, commercial mortgages and merchant cash advance. Every deal, client and lender relationship sits in one place, with the structure and fields that brokers actually need for each product type, rather than a one-size-fits-all pipeline borrowed from sales software.

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*Phillip Evans*

"Brokers in this space have been underserved by software for years," said Phillip Evans, Founder and CEO of FundingSearch. "Either they're using a CRM built for estate agents or recruiters and bending it into shape, or they're

running their whole pipeline through email and Excel. Neither approach scales, and both make it harder to give clients a fast, professional service. We built this because brokers deserve tools



designed around how commercial finance actually works."

At the centre of the platform is a deal pipeline that tracks each case through every stage, from initial enquiry and fact-find through to lender submission, offer, legal and completion, with the document and information requirements specific to each asset class built in. A bridging finance case prompts for exit strategy and valuation detail; an invoice finance case prompts for debtor concentration and ledger quality; an asset finance case prompts for equipment type, age and residual value. Brokers no longer need to build their own checklists from scratch for every product line they offer.

The platform also matches live deals against FundingSearch's lender panel, surfacing the lenders most likely to have appetite for a given case based on asset class, loan size, sector, geography and credit profile. For brokers who place across multiple product types, this removes much of the guesswork around which lenders to approach first, and helps avoid the wasted submissions that slow deals down and damage lender relationships.

Client and introducer relationship management sits alongside the deal pipeline, giving brokers a clear view of repeat business, referral sources and renewal opportunities across their entire book. Reporting tools let brokers and brokerage owners track conversion rates, average deal size and pipeline value by asset class, giving principals visibility over where the business is being won and where it is being lost.

"Commercial finance brokers are running multi-asset businesses, often with a handful of people covering everything from bridging to invoice finance to asset finance," Evans added. "They need a system that reflects that complexity without adding to their workload. That's what we've built. It's not a CRM with finance bolted on. It's been built from the ground up around the way brokers in this market actually work."

The CRM is available now on flexible monthly subscriptions, with tiers designed to scale from sole-trader brokers through to multi-adviser brokerages with larger pipelines and reporting needs. Existing FundingSearch users can connect the CRM directly to the platform's lender-matching engine, giving them a single environment for sourcing lender appetite and managing the resulting pipeline.

FundingSearch launched in 2025 and has built its platform on cloud-native architecture from the outset, avoiding the legacy infrastructure constraints that have slowed software adoption across much of the UK commercial finance sector. The broker CRM is the latest addition to a platform that already connects SME borrowers with brokers and lenders across the commercial finance market.

Brokers interested in a platform demonstration can contact the FundingSearch team to see how the CRM can bring their pipeline, client relationships and lender matching into one system.

## [About FundingSearch](#)

FundingSearch is a UK fintech platform connecting SME borrowers, commercial finance brokers and lenders. Founded in Sheffield in 2025 by Phillip Evans, a commercial finance specialist with 30 years' experience funding business growth and restructuring, FundingSearch operates as a technology platform and does not provide regulated financial advice, hold client money, or lend directly. Commercial lending to limited companies falls outside the Consumer Credit Regulation (CONC) and is therefore not regulated by the FCA. FundingSearch is registered with the Information Commissioner's Office (ICO Ref: ZB830848). FundingSearch.com is a trading style of In.Spiritu Ltd, registered in England & Wales, Company No. 16130699.

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