

## Aegis Funding Corporation

### Improve Customer Service

#### Executive Summary

##### Customer Name

Aegis Funding Corporation  
Houston, TX

##### Industry

Financial

##### Challenge

- In 2003, the Aegis Funding Corporation changed from a series of branches to regional offices. The reorganization meant 200 sales people no longer had a branch office to work from. Aegis used its reorganization as an opportunity to improve customer service

##### Existing Technology

- Blackberry devices

##### ConnexAll® Solution

- Customer Management

#### About Aegis Funding

Located in Houston, Texas, Aegis Funding Corporation is one of the top 40 largest mortgage production franchises in the U.S. The \$12-billion enterprise works directly with customers and independent mortgage brokers to finance home purchases.

#### Challenge

In 2003, Aegis decided it was time to rethink their old customer service model. They moved from a branch network, with physical locations all over the country, to regional operation centers. In the process, more than 200 sales people were left with no physical location to work from. Aegis had to decide how to keep their people connected to the larger organization, continue to increase their customer service efforts and compete more effectively.

#### The ConnexALL Solution

In 2003, the company reorganization made them wonder how they would keep in touch with more than 200 sales people no longer tied to a specific branch office. At the same time, this forward-thinking company saw an opportunity to leverage its current hardware investments to reduce hard costs associated with deploying a new system to improve customer response time.

About 220 sales people were given BlackBerry handhelds. Existing laptops were retired because they were no longer needed for communicating via email. Integration into their Microsoft® Exchange environment was seamless.

"It was an incredibly easy fit, architecturally, as well as from a maintenance standpoint," says Neil Notkin, President. "It just works – it does what it's supposed to do. Rolling out 200+ handhelds really involved very little effort."

In addition to having a highly portable, integrated handheld for phone, email and calendaring, they are using ConnexAll to access financial and corporate information and to increase their customer service efforts. In a short time, the solution has proved so effective, Aegis plans to deploy another 150 handhelds to other companies under their organizational umbrella.

The business case for future deployments is based on their current return on investment, which includes:

- A cost-effective solution for keeping the sales force connected and productive
- Reduced need for buying or maintaining up to 200 expensive laptops
- Ease of deployment in the existing infrastructure
- Access to intranet-based financial and corporate data via the ConnexAll Server
- Quicker customer response times





## Mobilizing the Sales Force

Aegis sales people are working more effectively, with an improved ability to respond to customers and make decisions faster. The successes with this deployment are paving the way for the future.

"I can tell you that we are spending the hours in our day more productively. We are providing customers with quicker response times and quicker gratification. And they, in turn, rate their association with us more positively," says Notkin. "When we reorganized, we really had two issues: What did we need to spend to keep our sales people productive and in touch and how could we build on our customer service efforts?"

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*"I'm proud to represent an organization that shows it's committed to delivering on promises and turnaround times."*

ConnexAll was an ideal fit for the uses of the Aegis sales team and specifically served the needs of an organization looking for a cost-effective way to restructure. Push-based notifications and email meant that no matter where a sales person worked, they didn't miss an important communication or have to report back to a particular physical location.

The integrated functionality on the handhelds meant one piece of equipment replaced several devices, including cell phones and laptops. Users liked the one-stop access to phone, browser, email and customer files and profiles. "To have access to the information you need in the palm of your hand is probably one of the most exciting things you can have in business," says Notkin.

From a customer service perspective, Notkin says ConnexAll and Blackberry have helped them respond to customers faster, which he admits is imperative in the competitive mortgage marketplace.

"Our goal is to reply to our customers in an immediate fashion – give them quick responses," says Notkin. "When a sales person is in the field, and a client asks a question, such as the status of a file, they may not be able to get to that information fast enough. ConnexAll has provided the sales people with an immediate tool to get important customer information."

To help sales people perform more effectively, Aegis extended their financial and corporate data to the field using ConnexAll's secure server. Sales people can now pull up revenue reports, daily production volumes, associated revenue, exception management, fees earned, projected income levels, interest rates and closing rates as easily as clicking a button.

For his customers, Notkin believes using ConnexAll says something about their commitment to serving them. He is proud to represent an organization that shows it's committed to delivering on promises and turnaround times.



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