



## Financial Consultancy Business Uses Web Forms - The Mortgage Lady

### About the business

The Mortgage Lady is the website of Janet Hall, a professional mortgage and insurance adviser near Oxford, United Kingdom. She gives consultancy to individuals as well as small and medium sized business enterprises. The company collaborates with external specialists and it has extended the range of cover towards services of mediation in tax affairs, wills and trusts, family separation.

### Issue

The services of a business like The Mortgage Lady involve complex communication processes. The level of regulatory documentation required makes automation a necessity.

The company utilizes standard industry CRM products. However, these are generally unsuitable for website integration which was main concern of Tim Stevens. He was responsible for implementation of new company websites incorporating a range of enquiry and data collection facilities. Developing these in the Net Fusion (website development tool) application was proving time consuming and delaying implementation - at which point he started to look for an alternative form building solution.

### 123ContactForm solution

Tim Stevens was referred by their web development software support team to 123ContactForm and decided to test the service. It was quickly evident that the forms being created would collect all the data requested by the consultancy team, and were aesthetical and easy to fill in. The data gathered is stored safely on 123ContactForm servers and each staff member (and appropriate external providers) of the Mortgage Lady team receives proper notifications straight to their desktop.

### Tools used and overall payoff

- Contact forms, callback request forms, quote requests
- Custom themes
- Multiple recipients

"Within a couple of hours I achieved more than I had in several days of development in the Net Fusion environment. My ongoing delay to the new site launch was ended and we had the whole site in for compliance approval the next day" Mr. Stevens states. He is now investigating further developments using 123ContactForm, such as full client factfind collection.

## TESTIMONIAL

*"123ContactForm solved a long term development problem quickly and cheaply, which overcame delays in site completion and launch in a matter of hours. As well as reducing time allocation to web development it has opened up a number of new opportunities. I thoroughly recommend the service."*

(Tim Stevens, Webmaster, [www.themortgagelady.co.uk](http://www.themortgagelady.co.uk))

## Summary

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ISSUE



2

SOLUTION



3

PAYOFF

The Mortgage Lady team needed an automated solution to handle the amount of information input from their customers. Solution had to be easy to deploy and integrate well with the company's new website.

123ContactForm offered tools for shaping the needed web forms and disseminating them automatically to their recipients, the company leads. Submission notifications were delivered directly to the proper staff members.

The solution was time effective in both implementation and usage. The process of documenting new leads and data collection is now far shorter and more comfortable for customers and the consulting team.