



THOUGHTSPOT

Primary Capital Mortgage Maximizes Revenue with ThoughtSpot

CUSTOMER SUCCESS STORY

A Leader in Mortgage Lending

Primary Capital Mortgage (PCM) is a residential mortgage lender offering home loans across the United States. The company's mission is to deliver an outstanding client experience while building the most innovative, respected, and operationally efficient mortgage servicer in America.

Unlocking Holistic Insights

At PCM, account executives manage 60-120 new loans per month. Getting visibility to the status of those loans at the individual account exec. level all the way up to the leadership team is critical to the success of the company. PCM had a vast amount of complex data about their mortgage services stored in a data warehouse that could only be accessed by a technical IT team.

As a result, PCM's 20 account executives had to spend 2-3 hours a day just to get daily updates on the status of the outstanding mortgages they manage. Additionally, they lacked a holistic view of each customer, and were missing out on opportunities to acquire new customers or provide additional products and services to existing ones. Even doing something as simple as reporting on daily KPIs for the CEO was a challenge.



INDUSTRY

Financial Services

EMPLOYEES

170



3 DEPARTMENTS

Sales
Underwriting
Operations



3 DATA SOURCES

SQL, MySQL, ADP



1 BILLION

Annual Loans
Funded



600 hours

per month saved
for the sales team

ThoughtSpot Increases Sales Visibility

Gaining a 360 Customer View

Primary Capital is using ThoughtSpot to give employees direct access to search and build reports and charts across their company data in seconds. ThoughtSpot combines data from multiple sources to give the reps a seamless search experience.

Now an account executive can get up-to-date information about a customer's outstanding mortgage details and see a complete 360 degree view of a customer's product portfolio. Even better, they can drill down into the underlying data to uncover opportunities to cross-sell and upsell to a partner, or to identify trends and show service metrics to earn new business with new partners.

All of this is enabled without taxing IT resources, and saves the reps countless hours of wasted time. Going forward, ThoughtSpot will become the executive dashboard for the entire company, giving the C-suite the ability to access KPIs instantly and interact with the data directly.

From 600 Hours to Instant Results

With ThoughtSpot connected directly to the data warehouse, PCM has reduced the amount of time its account executives spend tracking loan status from 1-2 hours down to 2-5 minutes each day. That is close to 600 hours saved per month for the sales team, valuable time that the reps can now spend selling.

Search-driven analytics makes Primary Capital's reps more productive, gives executives visibility into the performance of the company, and boosts customer happiness and company revenue.

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With ThoughtSpot, account executives are more productive and have visibility into the performance of the company. The direct access to data and insights helps us optimize processes and keep our clients happy.



- Walt Carter, CIO,
Primary Capital Mortgage



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