# FINOVA

# Emily Mortgage Services cuts admin time by 6–8 hours a week with Finova Broker CRM

Read how Emily Mortgage Services adopted Finova's Broker CRM to streamline admin, improve compliance, and create a more connected broker experience — enabling stronger customer engagement and business growth.

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### 1 week from build to go-live
Platform deployed quickly and tailored to the business

### Compliance automated
Suitability reports and client documents send instantly on invite

### 6–8 hours saved weekly
Significant time savings on admin tasks, so advisers can focus on clients

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## Introduction

Emily Mortgage Services is a UK-based mortgage brokerage dedicated to delivering a simple, customer-first homebuying experience. With a growing client base and an expanding team of advisers, the firm wanted a system that could scale with its ambitions while keeping compliance and efficiency front and centre.

> *"We wanted a system that could keep pace with our growth, improve compliance oversight, and help advisers spend more time with clients rather than managing paperwork."*
>
> – Emily Franks, Director, Emily Mortgage Services

## The challenge

Before partnering with Finova, Emily Mortgage Services relied heavily on manual processes, which created inefficiencies and slowed growth. Tracking cases across spreadsheets and fragmented systems made it difficult to:

- Maintain full visibility of client progress and documentation
- Ensure compliance and audit readiness with ease
- Give brokers the tools to focus on relationship-building instead of admin

## The solution

Emily Mortgage Services selected Finova's Broker CRM to future-proof its operations. The platform was chosen for its industry-specific functionality, scalability, and ability to integrate seamlessly with the brokerage's existing processes.

*"The CRM transformed how we work. Everything from tracking client progress to monitoring compliance is now in one place. It's streamlined and intuitive for our advisers."*

– Emily Franks, Director,
  Emily Mortgage Services

**Key features included:**

- **Automation tools** to reduce manual admin and enable smarter client follow-ups.

- **Real-time dashboards** giving advisers a clear view of cases and compliance checkpoints.

- **Customisable workflows** designed specifically for mortgage brokersoperational costs.

## The results

Since implementing Finova's Broker CRM, Emily Mortgage Services has seen measurable improvements across its operations:

**Operational efficiency**
The CRM saves the team 6–8 hours a week on admin tasks, allowing advisers to focus on clients.Compliance confidence: Real-time dashboards and audit-ready reporting strengthened oversight and reduced risk.

**Client engagement**
Personalised communications and streamlined workflows helped improve customer retention.

*"Finova's CRM gives us the confidence that we're compliant, efficient, and client-focused. It's helped us scale in the right way."*

– Emily Franks, Director,
  Emily Mortgage Services

With Finova as a partner, Emily Mortgage Services is building a scalable, future-proof brokerage model. The team is continuing to use automation, analytics, and custom dashboards to drive growth while ensuring advisers can do what they do best: delivering a seamless and personalised experience to every client.

## Future-proof your brokerage with Finova

See firsthand how our technology can support your business growth.

Book a demo