

How good is the software that you trust to run your business, and as importantly how would you rate the service you get from your supplier?

Many suppliers boast about how good their FinTech is, some are even able to boast about the quality of their support. However, the reality can sometimes be somewhat disappointing. At 360 Dotnet it is not only us who are proud of our software and support we provide to our customers, as you can see below, real customers think so too!

Cooper Associates Mortgages, award winning mortgage advisers based in the South West, wrote to us saying how pleased they are with not only their 360 Lifecycle software but also the interaction with the people within 360 Dotnet.

"After years of using other CRM systems, we decided to investigate the alternatives available. We were keen to improve our processes and the systems we were using would not support our future expansion plans.

In January 2018 we met with several businesses offering alternatives but there was a company which, in our unbiased view, stood out way ahead of the rest, this being 360 Dotnet. They had a great system but what attracted us most was their plans to improve and develop their offering significantly. This was very aligned to our plans, but we could not start our journey without joining theirs.

From this initial meeting all the way through to our training in June 2019, the whole experience was exceptional.

The 23 Advisers, 8 Administrators, our Management team & our Accounts department were trained over a 3 day period. This was done to a very high standard. 6 hours of classroom training can be challenging to both deliver and

receive but it was delivered superbly, it was engaging throughout. Everyone at our business left the training excited about the new opportunity the system presents, and this was a testament to our Account Manager and his delivery. We have also had follow up sessions which have been extremely beneficial and much more detailed now we are actively using the system. Thank you again.

In addition to this onboarding, we decided to import our client data from our previous CRM provider. Historically, when we joined previous CRM providers, we opted to keep our old system active for client data and run both. Eventually, this proved to be a mistake, so we were keen to get back to using one system. The import was considered and reviewed diligently by the data migration team at 360 and whilst there was a lot of data checking, the eventual outcome was one we were very happy with. The hardest part was getting good data out of our old system but once this had been achieved the team were working around the clock for us to get it in ASAP. Absolutely everything we had in our previous CRM provider was imported over, from client details to documents and mortgage expiry dates.

We couldn't be happier with the new system and have now been using it since 1st July 2019. We are very excited about the future developments that are being made and the further efficiency improvements this will make to our process.

Whilst we made minor changes in the past, our core processes remained the same and were very paper based. With this, we would never be able to give our Advisers more time to see and

help clients without improving this area. Thanks to 360 Lifecycle, we have now gone 99% paper free using tablets in meetings for fact finding and presenting to clients. Advisers saw efficiency improvements within days following the launch which was incredible to see. We anticipate being able to work 50% smarter with the change and 360 are at the core of that."

From all of us at Cooper Associates – thank you to 360 Dotnet and the whole team for supporting us

Cooper Associates Mortgages has been named Best Mortgage Office in the UK by The ESTAS for the last three years. They offer a fee-free, whole of market service – to find out more visit www.cooperassociatesltd.com

360 Dotnet has developed 360 Lifecycle as the ultimate practice management system for financial services businesses. 360 Lifecycle currently provides benefits to over 20% of the mortgage market. 360 Lifecycle offers a client facing FactFind and a secure Client Portal which helps to save further time and improve client relationships.

If **your business** would like to benefit from a similar experience to gain these positive outcomes, please contact enquiries@360lifecycle.co.uk or call our team on 08456 592360.

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