



How Waterstone Mortgage Uses Jungo to Support Their **\$1 BILLION BUSINESS**



Background

Dustin Owen currently co-operates and runs a \$1billion retail production operation, which he co-founded with his two business partners in 2008. He and his team knew the importance of database management and created a system that worked in order to scale his business. He hired an assistant to learn database management in order to market to leads consistently and effectively.



The Challenges

- Find a modern CRM that can handle their rapid growth
- Find a more efficient way to manage their data
- Work out of one centralized system



The Solution

- Complete Customization
- Powerful Automations
- Dynamic Reports & Dashboards



The Results

- 100% Improved Efficiency
- One Stop Shop
- #1 Recruiting Tool

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As more tools came out to support mortgage loan officers, they spent too much time switching back and forth between software. They needed a more efficient way to operate in order to scale their business.

They initially adopted Act as their CRM solution, but soon discovered that its capabilities fell short as their business expanded. In their pursuit of a more suitable alternative, they came across Surefire, which demonstrated considerable promise. However, Surefire alone proved insufficient to completely replace Act. Consequently, they found themselves utilizing Act for certain tasks, Surefire for others, an LOS platform for efficient pipeline management, and relying on Excel for lead tracking. While the availability of these tools was beneficial, the drawback emerged when it became evident that operating across four distinct systems consumed a substantial amount of their valuable time.



The Solution

-  **Complete Customization**
-  **Powerful Automations**
-  **Dynamic Reports & Dashboards**

Waterstone Mortgage discovered the perfect solution in Jungo, effectively overcoming their obstacles. With Jungo, they gained the ability to create a fully personalized CRM system that perfectly aligns with their daily operations. Leveraging its automation capabilities, they effectively marketed to their leads and automatically provided loan status updates. Jungo's dynamic Reports & Dashboards became an invaluable resource, enabling them to identify the realtors they needed to call, which leads they needed to nurture, and which clients they needed to update.

Results



100%
Improved Efficiency



**One Stop
Shop**



#1
Recruiting Tool

Jungo gave them the results they desired which is why they advocate for us. Jungo allowed them to go from supporting 40 loan officers to 80 without any additional time or resources. Being built on Salesforce and having endless integration options, it allowed them to consolidate their favorite software. They also use Jungo to recruit the best loan officers to work for them. Joining a company that knows how to fully utilize a mortgage CRM is a big selling point that they use to their advantage.



“Why do I always plug Jungo to our TLOP community of tens of thousands of mortgage professionals? Easy. I believe in the product. As someone who still runs a production team and someone who co-operates an 11-branch network that funds over \$1 billion annually, Jungo and how we use it is our secret weapon.”

Dustin Owen

Waterstone Mortgage

\$1 Billion Business

Co-operates an 11-branch network that funds over a billion dollars every year.

Certified Mortgage Banker

Dustin is a Certified Mortgage Banker which is held by only 1,000 active mortgage professionals.

#1 Podcast

Dustin is the creator and host of The Loan Officer Podcast and has built a community of 10,000+ mortgage professionals.

