

# Strategic Partnership Results in Long-term Shared Profitability

Five year partnership with Digital Mettle assists SASS company in building their mortgage industry tool suite and results in a successful acquisition.

## GOALS

- Creation of core components of a SASS system for mortgage professionals
- Enable clients to manage their sales process: lead acquisition, marketing, client education, product pricing, and customer relationship management
- Increase company asset value for future acquisition

## TECHNOLOGY

- ASP.NET applications hosted at 3rd party managed data center
- Microsoft SQL Server Database
- Angular
- Sencha Touch and Cordova
- Azure DevOps (formerly Visual Studio Team Services)

## APPROACH

- Act as a strategic partner instead of outsource vendor
- Gain industry knowledge and contribute to product road map
- Establish good working relationships with internal development teams to facilitate efficient and cost-effective divisions of labor
- Lead in developing DevOps best practices to meet regulatory environment

## RESULTS

- Over 10 years of successful working relationship with key stakeholders from start-up through multiple buy-outs
- Hundreds of corporate customers serving hundreds of thousands of their clients.
- Two corporate acquisitions of Digital Mettle developed technology in 10 years

## In it for the Long Haul

Digital Mettle's relationship with Vantage Production began with our development of the Borrow Smart Analysis software for KendallTodd. When BSA was acquired by Vantage Production, Digital Mettle was engaged to assist in the integration and maintenance of that software as a core component in the Vantage Integrated Production Suite.

Since that initial support contract, Digital Mettle has been instrumental in expanding and enhancing the Vantage platform. We built an integrated multi-tenant web hosting and content management platform (Vantage Sites), a fully functional mobile version of the complete Sales, Marketing, and CRM tools (Vantage Mobile), as well as a flyer authoring system that operates as a stand-alone or integrated component (Vantage Open House Flyers).

Although Digital Mettle was not a financial stakeholder in these products, we always embraced our role as a "partner in success" alongside Vantage.

## Gaining Industry Knowledge

Key to our value to Vantage was our ability and willingness to gain knowledge within the Mortgage Industry. Because of our domain expertise and ability to "speak the language", we were well prepared to understand the unique requirements of mortgage officers and brokers and to balance those against the unique needs and requirements of lending compliance officers.

By building our own domain expertise we have been a valuable asset, specifically in our ability to straddle the line between strategy and implementation. We were able to translate business strategy into systems requirements and to translate technical hurdles into business decisions.

## RESPA, HOEPA, FCRA compliance

Regulations specific to the mortgage industry center around giving consumers complete and accurate information regarding complicated financial products.

Since the output of all of Vantage's systems was sales and marketing content, a key to our being a valuable partner was our ability to quickly understand industry regulations and assure that the output of our systems remained compliant while providing the greatest amount of flexibility and differentiation for the loan officer.

## Development and DevOps in a Regulated Environment

Financial regulated environments require discipline for release management and process documentation. Digital Mettle assisted Vantage by automating and standardizing practices across full development life cycle. We further provided strategic consulting with Vantage CTO on best practices related to software quality and risk management.

## Offering Flexible Services to the Client

Over the lifetime of our relationship, Digital Mettle was able to serve in various capacities with Vantage. We established and implement the company's first mobile strategy. We were instrumental in assisting the company from moving from in-house systems to cloud-based hardware. We provided second-tier customer support directly to Vantage clients.

