

# CIVIC Financial Services Taps Progress® Sitefinity® for Dynamic Content Creation, Personalization Capabilities

## CASE STUDY



**COMPANY**  
CIVIC Financial Services

**INDUSTRY**  
Financial Services

**PRODUCT**  
Progress® Sitefinity®

**COUNTRY**  
United States

**SUMMARY**  
Providing mortgage brokers and real estate investors with reliable and efficient sources of funds in more than 30 states, CIVIC Financial Services needs to ensure its website delivers a user experience that exceeds expectations. Its dated, proprietary CMS that required a digital agency to manage, was not up to the task. By partnering with Visus LLC, CIVIC implemented Sitefinity for its dynamic content creation capabilities and strong personalization that now delights customers.

## Challenge

With an inflexible proprietary backend that required a digital agency to update content, limited personalization and difficult third-party integrations, CIVIC Financial Services knew it needed to modernize its CMS to better thrive in the competitive real estate finance market. First on CIVIC's list of priorities was to become self-sufficient.

“We were extremely limited in what we could do on our own without the agency,” said Ian Rosenberg, Digital Marketing Manager, CIVIC Financial Services. “We could only update verbiage here and there, and even that wasn't consistent. We're in a dynamic changing market that demands fresh, up-to-date content.”

Also, on the wish list was the ability to provide a personalized digital experience based on persona, powerful integration capabilities and fast-loading pages to enhance the user experience and boost SEO.

After a thorough period of due diligence, CIVIC chose Sitefinity and certified Sitefinity partner Visus LLC, after signing off on a discovery engagement that produced a detailed statement of work and migration plan.

## Solution

With its ability to enable multiple non-technical content authors to create, edit and publish updates to the site, combined with integration capabilities that streamline the posting of critical customer reviews and strong personalization and SEO capabilities, Sitefinity checked many boxes for CIVIC.

“With Sitefinity's content management and digital experience capabilities, it feels like we have been given the keys to the kingdom,” Rosenberg said.

The implementation process did not disappoint either.

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Digital Marketing Manager

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“There was a process and project plan light years ahead of our previous implementation,” Rosenberg said. “We worked from a week-to-week checklist and methodically got it done without delay or aggravation.”

“To make the content migration as smooth and effortless as possible for CIVIC, the Visus team analyzed the old proprietary CMS’s APIs, created all the required templates, and then migrated all the content programmatically to Sitefinity. This is the power and flexibility of Sitefinity and why we love working with it,” said Michael Daoud, CEO, Visus LLC - Sitefinity Certified Partner.

## Results

The implementation of Sitefinity has had a profound impact across CIVIC’s business. Since implementation, the firm has increased engagement and fund conversion rates, while reducing expenses and time lag. In addition, its powerful integration with third-party review site Experience.com has shaved a 30-day process down to seconds.

Customer reviews have become an indispensable marketing and sales tool for many businesses, including CIVIC. Its old system required about 30 days just to upload the CSV files. Now the process takes less than a minute.

“The team developed a very easy-to-use API for us to go in and just import the reviews directly,” Rosenberg explained. “Now, we’re able to see it as a draft and just check for any kind of typos and then hit save. So literally a 30-day process went down to 30 seconds more or less.”

Even tasks like setting up paid search campaigns have been dramatically overhauled with Sitefinity. “Now we just create the landing page, integrate with our CRM team and we are on our way,” Rosenberg said. “The time efficiencies created by Sitefinity are allowing us as a team to be self-sufficient and get so much more done than before.”

And when it comes to the impact on the business itself, online loan conversion rates are up.

“There’s a lot of factors that affect application rates, but it is notable that before Sitefinity we were at about 1% and that rate is now 5%,” Rosenberg said. “I also attribute that to our ability to produce more proactive marketing campaigns.”

Moving forward, CIVIC is looking at a number of ways to further enhance the customer experience.

“Sitefinity has empowered us with time to do things we could have never done before,” Rosenberg explained. “For example, we have made a lot of progress with personalized content by persona and we are looking at new capabilities like rate calculators and further integration with our CRM that will improve the entire customer journey and experience.”



## About CIVIC

CIVIC provides Mortgage Brokers and Real Estate Investors with a reliable and cost-effective funding source for their real estate investment needs in 30 states and the District of Columbia.



## About Visus

Visus LLC, a digital experience and transformation company is a Progress Sitefinity Partner and Service Delivery Partner, excels at developing digital solutions, focused on the User Experience and a solid technical foundation. Corporations and public sector organizations rely on Visus for well-thought-out and designed solutions that work right the first time. By collaborating closely with clients, Visus fills the gap that often exists between a company's vision and the technical implementation, creating an architected solution focused on the user experience that also solves the business problem and delivers an ongoing ROI. Company to company, project to project, Visus helps organizations reshape their businesses to succeed in a digital-first world.

For more information, visit <http://visusllc.com/>



Create Dynamic Content and Personalized Experiences on Your Website with Progress® Sitefinity®




## About Progress

Dedicated to propelling business forward in a technology-driven world, [Progress](#) (NASDAQ: PRGS) helps businesses drive faster cycles of innovation, fuel momentum and accelerate their path to success. As the trusted provider of the best products to develop, deploy and manage high-impact applications, Progress enables customers to build the applications and experiences they need, deploy where and how they want and manage it all safely and securely. Hundreds of thousands of enterprises, including 1,700 software companies and 3.5 million developers, depend on Progress to achieve their goals—with confidence. Learn more at [www.progress.com](http://www.progress.com)

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