



Custom CRM Dev for Financial Services Firm

PROJECT DETAILS

 Custom Software Development

 May. - Jul. 2021

 Less than \$10,000



"Alex was a great problem solver."

PROJECT SUMMARY

Alex Cachia provided custom software development services for a financial services firm. They helped build a CRM system to help the client better manage their mortgage data.

PROJECT FEEDBACK

The delivered solution was fully functioning and delivered on time. Alex Cachia communicated clearly and consistently via Zoom, ensuring both sides were always on the same page. They also impressed with their problem-solving skills.



The Client

Please describe your company and your position there.

I'm the managing director.

The Challenge

For what projects/services did your company hire Alex Cachia, and what were your goals?

We needed a mortgage database for our clients which could be web based.



Dave Johnson
Managing Director, Suitable
Choices



Financial Services



1-10 Employees

CLIENT RATING

5.0

Overall Score

Quality: 5.0

Schedule: 5.0

Cost: 5.0

Would Refer: 5.0





The Approach

How did you select this vendor and what were the deciding factors?

Alex spent a lot of time sorting and ensuring that the right things were done for each sector. Attention to detail was incredible

Describe the scope of work in detail, including the project steps, key deliverables, and technologies used.

Full creation of a fully functioning CRM

How many people from the vendor's team worked with you, and what were their positions?

Just Alex (Web Developer) – she was amazing.

The Outcome

Can you share any measurable outcomes of the project or general feedback about the deliverables?

Perfectly working CRM which tailored to our needs.

Describe their project management style, including communication tools and timeliness.

Easy to communicate with via Zoom, email, and mobile. My assistant Janice couldn't speak highly enough of her.

What did you find most impressive or unique about this company?

She was a great problem solver.





Are there any areas for improvement or something they could have done differently?

No.

