Land Home Financial Services Corporate Website RFP

Introduction

Land Home Financial Services (LHFS) is a community-based lender providing diversified funding options and consistent, superior, personalized service to clients and partners, including: homebuyers, mortgage brokers, builders, manufactured/modular home retailers, loan officers, and real estate agents. Over the last 10 to 15 years LHFS has sewn together multiple online tools and services. LHFS seeks to update and streamline it suite of online properties and systems into a more cohesive and branded experience for public users and partners.

Purpose

LHFS aims to create a flexible, informative website that is easy to maintain. The chosen vendor must develop a website that can support splash pages and microsites, email marketing, CRM integration, and management of static and dynamic content. This user-friendly website with an intuitive interface needs a web-based, database-driven, stable, and secure CMS that allows key staff to easily update content without directly accessing source code. CMS may be delivered within MS SharePoint. Additionally, LHFS requires expert consulting on technical solutions and options moving forward.

LHFS is also embarking on a realignment of our branding in online and printed marketing materials. A vendor who exhibits talents in marketing and design in addition to development would be preferred. If you qualify, please include three relevant case studies of marketing/branding projects completed recently.

Current System Configuration

LHFS currently maintains a number of online properties which cater to specific audiences (listed below). Additionally, LHFS maintains a CRM but is in the process of replacing it with Salesforce. The corporate IT team can offer programming and systems support primarily in ASP.Net. LHFS will host all servers in-house.

- http://lhfs.com ([www.lhfinancial.com, www.landhome.info](http://www.lhfinancial.com))
- https://www.land-home.net/

Functionality Requirements

The web site will be constructed in phases to allow LHFS direction, approval, and acceptance of each phase of the development. A high level overview of the functionality required follows.

Corporate Retail Site - Public Facing

- Integrate all public-facing online properties (listed above) into a "single" entity managed via CMS.
- Update look and feel from to-be-updated corporate logo and branded colors, similar to what exists now.
- All online properties must be fully responsive to desktop, tablet and smartphones.
- "Presentation screen" layouts may be included as an option (for display on monitors within the offices).
- Site must be compatible with all current and previous major web browsers (including Google Chrome, Mozilla Firefox, Safari, Internet Explorer 9+, iOS, and Android)

- Workflow/Users: There will be 5-10 editors of the corporate site needing granular access. Super-Admin access is needed for IT staff. Varied access required for satellite sites and splash pages.
- Fuzzy matching and nearby location search is needed for the "Find a Branch" feature. All loan officers (LOs) in the branch need to be listed alongside their headshots and contact information.
- Google Analytics is currently in place but will need to be reconfigured. SEO and usage reports need to be emailed monthly. Ongoing support for SEO improvements may be required.
- Vendor may set costs per site or estimate time and materials for the migration of content into the new system. This content may include current corporate site content and loan officer website content and blogs.
- End users must be able to share our content on their social channels and LHFS will want to cross-promote time sensitive content on LHFS social channels (Facebook, Twitter, LinkedIn).
- LHFS is in the process of creating unique video content for online consumption, posting of video must be easy for site editors.
- All website users will benefit from a fully accessible website adhering to current W3C base standards.
- Please include an option to display region-specific content and imagery for just the corporate retail site. This may include a regional header image and minor text variables.
- There needs to be a module to easily create and modify basic online forms with responses stored within the CMS (possibly SharePoint) and emailed notifications sent to a designee.
- An online chat module integration is needed. Chat will be staffed by the sales team. A chat system is currently in place and integration code will be provided, some styling may be needed.
- Ability to set alerts for subscribed users to get an auto-generated email when documents have been posted or updated.
- Module for easy to create galleries and slideshows is desired.
- Site performance will need evaluated to determine if image caching may be needed.

Realtor / Loan Officer Business Card Widget

Our loan officers partner with realtors to provide customers with a hassle-free home buying experience. These partners will swap digital business cards on each-others' sites allowing customers to get pre-approved for loans and find a realtor. To keep the online experience cohesive we require a widget be built to integrate partner information onto guided splash pages.

- Business card Features:
  - Fields:
    - headshot
    - logo
    - first and last name
    - email address
    - phone number
    - website link
    - optional chat now button
  - Record leads to CRM and analyze performance.
  - Ability to build the widget, preview it and send embed code to partner via email with basic instructions for implementation.
  - Integration of business card into Splash pages (see next section).

Splash Pages

At any time there will be 20+ targeted splash pages advertising relevant products to our customers and partners. These splash pages must have impeccable search engine optimization, keyword-laden URLs, lead capturing opportunities, and identify as the LHFS brand. Customizable widgets need to feature LO or realtor business cards described above, social sharing, and a customizable header and background. The layout of these pages may be similar, only a few templates are needed. Examples include promotions for the HARP program or a partnership with a large employer needing to relocate many staff for a new office or factory.

Satellite Sites

LHFS requires a system which automates creation of standalone, branded, fully-featured satellite sites for loan officers to include:

- Migration of existing sites
  - Option for personalized/vanity URLs both the creation of new URLs and the integration of existing domains.
  - Possible content migration of existing website content on a case-by-case basis. Some LOs have websites which need to be brought under compliance with the law within the corporate structure.
  - LHFS will assist in locating these existing sites and connecting vendor to site owners.
  - A process for integration will need to be devised. Buy-in from LOs to use the new system is important; it needs to be easy for LOs to adopt the new sites.
- Features and Functionality
  - "Plug-in" type features/modules such as blogs, email newsletter signup, image galleries and carousels, "Apply Now" buttons, calendar, and social media links out and share to.
  - Robust calendar needs to show corporate events but allow for branches to add their local events. Some method of approvals may be needed.
  - Content approval process allowing corporate editors to either approve new content before posting live or to modify/remove posts after notification of publish. A system to "whitelist" trusted publishers is desired to reduce strain on corporate editors.
  - Some pages need to be automatically included and contain "master" content pulled from/updated by the parent site, not changeable by the satellite site editor (about the company, partners, philosophy, jobs, glossary, general mortgage information). This content from the parent site needs to be modifiable/updated as needed. Corporate editors will also provide timely blog updates, events, and news to the LOs for publishing.
  - Integration with the CRM and other systems allowing the sites to be "spun up" once a new employee is added to the system.
  - Media library must include brochures and marketing materials (updatable from the parent repository within SharePoint).
  - Ability for end customers to login to other systems to access resources such as loan application status updates and/or milestone accomplishments to all parties involved in the transaction.
  - Ability to search MLS database to shop for real estate.
  - Control of menus to add pages and links in various widgets (header footer, sidebar style menus of link lists).
  - Adoption of the system is important, features need to be easy to use.

- Design Considerations
  - Modular template / page layout options for different use cases such as home, blog, calendar, splash page for promotions. Template designs must allow for drop zones of content. Template layouts may include a right sidebar, left sidebar, no sidebar, full screen, pinboard style, full image background… to be discussed.
  - Changeable skins using variations of the color palettes from LHFS branding. May include light on dark, dark on light, high contrast, classic, or modern, where branded colors and fonts are reconfigured for a unique visual experience.
  - Ability to add unique static content as a page, post, or widget.
  - Customizable widgets for:
    - Header and footer
    - LO bio and office/contact info
    - Social media accounts
    - Realtor partner link-sharing
    - Search the MLS
    - Forms
    - Corporate 'ads' or notices

Capture Leads in CRM

Assist to identify opportunities to capture customer information for integration into CRM for follow up. May be email newsletter sign up, loan preapproval, or chat request. Logged in customers will have access to unique and targeted information and articles.

Training Documentation and Maintenance

- Some in-person training will be required in Concord, California.
- Super users will primarily maintain the site and be responsible for daily upkeep and training of other staff.
- Authors/content editors will primarily maintain existing content, add events, and occasionally post new content.
- There will be a need to introduce LOs and realtors to the satellite sites and how to get started.
- We do not see the need to create completely customized training materials but some "Quick Guides" and online written and video references will be needed.

Assist in Goal Setting and Success Metrics

We aim to meet the following measurable goals:
- Consistency in presentation. Do all pages and templates look like they are related?
- A strong identity and strong brand. Does each page identify that it is the LHFS? Are colors and fonts consistent?
- Navigation structure to improve user engagement. Can we get to any page within 3 clicks?
- Search: Is the search effective in returning applicable results?
- Design for effective use of colors to indicate clickable words, headlines, sections. In usage tests are we getting good success metrics for specified tasks?
- Section 508 compliance level A.
- Identify other post-launch goals… what does success look like?

Future Integrations with Underlying Technology (Optional)

Although we do not require set costs at this time, LHFS is interested in the vendor's capability to integrate functionality with our other systems:

- Loan Origination System: PC Lender
- Customer Relationship Management System (Salesforce)

Proposal Guidelines and Requirements

Responses should be concise and relevant. Please include the following sections in your proposal response:

1. Cover Letter
2. Executive Summary
3. Company overview, including years in business, location, team members, biographies for company leadership and those who will work on the project.
4. Approach. Please section into phases and milestones as they apply to your process, for example:
    a. Overview
    b. Discovery
    c. Design
        i. Optional: Include three relevant case studies of marketing/branding projects completed recently.
    d. Development
        i. Content Management System solution: Include information on the creator/company, years in service, number of versions/releases, schedule of updates, vendor's standing/relationship with the software manufacturer.
    e. Quality Assurance Process
    f. Training: Describe methods, number of sessions or videos, extent of customization of training materials for segmented users.
    g. Launch Process
    h. Post Launch Support (within 30 days of launch)
    i. Warranty
    j. Ongoing Maintenance (yearly)
5. Timeline for Development
6. Investment / Budget
    a. Separate costs into phases
    b. Include options for add-ons
    c. Detail tasks that may need billed on time and materials such as content migration
    d. Include license fees by year, over 3-5 years
    e. Include expenses and taxes if applicable

Proposal Timeline

Proposals must be received by 5PM on Friday, March 13, 2015 to be considered. Proposals should be sent via email to webrfp@lhfs.com, please use this same email for any questions you may have. Please keep proposals under 5 Megs. An email reply will be sent to confirm receipt of proposals. LHFS will need 2-3 weeks to review proposals, the top 3 vendors will be invited to present their solution and participate in discussion with the LHFS team.

Background & Resources

Competitors
- [RPM Mortgage](#)
- [Prospect](#)
- [Sierra Pacific Mortgage](#)
- [Total Mortgage](#)
- [Envoy Mortgage](#)
- [Embrace Home Loans](#)
- [Premier Lending](#)

Assumptions
It is assumed that LHFS will provide the following components:
1. Hosting server(s) for .NET 4.5, IIS based applications.
2. Database server(s) with licensed instance(s) of MSSQL 2008R2 or higher
3. Network connectivity for public access to site(s) developed
4. Hosting and DB servers for UAT testing (can be same server)
5. VPN access to all servers for development team
6. Inbound and outbound email capabilities and sufficient SMPT relays for email campaigns.
7. Chat functionality that is integrated into site through provided, embedded javascript code.
8. Web service integration into CRM for exporting of captured profiles on the site.
9. Web service integration with LOS for uploading of new applications as well as updating of in-process application statuses.

Terms
- LHFS is open to international vendors but require local, accessible project management and core team.
- Billing will be progress-based on acceptance of milestones.

Tentative Site Map
- HOME
- MORTGAGE CENTER
  - Overview
  - Calculators
  - Glossary
  - Loan FAQs
  - Ask a Loan Advisor (form)
  - Required Documents
  - Loan Servicing
- ABOUT
  - Overview
  - News & Events
  - Licenses
  - Disclosures

- ○ Privacy & Security
- JOIN:
  - ○ Overview
  - ○ Become a Loan Officer
  - ○ Branch Opportunities
  - ○ Benefits
  - ○ How to Apply
- APPLY ONLINE:
  - ○ Locations
  - ○ Ask a Loan Advisor
  - ○ Required Documents
- EMPLOYEE LOGIN
- CONTACT
- BRANCH LOCATOR
  - ○ Loan officer websites
  - ○ Branch websites
- SERVICES:
  - ○ Construction Lending
- SPLASH PAGES (for SEO and Marketing)
  - ○ Numerous and ever-changing...