



# MORTGAGE SYSTEMS IMPLEMENTATION, CONVERSION, AND OPTIMIZATION SERVICES

If you're involved in mortgage origination and/or servicing, your choices regarding system selection and implementation play a vital role in enhancing and transforming your business strategy. Selecting the appropriate system or third-party support provider can significantly reduce risk, expenses and operational disruptions. By integrating, upgrading, and refining your platforms with the latest workflow technology, you can streamline operations, boost productivity, minimize risk and increase profitability.

Consolidated Analytics offers Operational Excellence Consulting and Advisory services for mortgage systems implementation, conversion, and optimization. Our services equip leaders in the mortgage industry with the expertise and tools necessary to evaluate, choose, implement, convert, and continuously enhance mortgage systems.

Our team provides actionable strategies supported by proven project delivery success stories. Leveraging decades of experience in mortgage operations and technology, our expert Operational Excellence team of consultants, methodologies, and programs help lenders and servicers drive shorter implementation cycles delivering tangible results, including:

- Increased profitability by 69% for a mid-sized bank
- Reduced servicing cost per loan by 50% for a nationwide servicer
- Reduced cycle times by 55% for FHA and conventional loans for a nationwide lender
- Achieved \$30MM cost savings and efficiency gain over four origination channels for a national lender

## OUR SOLUTIONS FOCUS ON:

### Strategic Objectives

Whether you are sourcing a new system or upgrading an existing one, our consultants and analysts collaborate with you to deliver actionable programs in line with your business goals and priorities.

### Technical Requirements

Leveraging deep expertise in mortgage lending and servicing technology encompassing architecture, infrastructure, data analytics, automation, coding, and testing, we help you in pinpointing and integrating the most suitable features and functions to optimize your business strategy and technology investments.

### Operations and Process Excellence

We develop road maps and plans to ready your organization for system changes, focusing on regulatory compliance, operational risk mitigation, and identifying opportunities for process improvement.

### Talent and Resources

We ensure a smooth system rollout and user adoption we combine expert consultants with advanced project management tools, effective communication strategies, and comprehensive training programs. Our team of Operational Excellence consultants possess specialized expertise in technology, compliance, operations, and design, earning trust from our clients to fulfill technology staffing requirements.

# SOLUTIONS & SERVICES OVERVIEW

## Discovery & Selection



- Identify and vet vendors
- Define and develop 1, 3 and 5-year strategic objectives
- Conduct gap analysis and gather business requirements
- Manage third-party vendor selection, negotiation and contracting

## Business Process and Project Planning



- Document system and processes
- Define business and platform architecture needs
- Develop and manage project plan including timelines, milestones and tracking mechanisms
- Map process org charts and ownership

## Resource and Team Development



- Identify and define internal and external resource, staff and skills needs
- Create project scope, structure and sign-off
- Staff and organize a skilled project team to align with the project plan
- Define project tools and artifact storage

## Platform Configuration and Custom Coding



- Set up core system parameters
- Define workflow and implement system interfaces
- Define reporting requirements
- Implement business rules and controls
- Create stand up deployment architectures

## Implementation, Conversion, Testing, and Training



- Develop system roll out plans and deployment strategies
- Create operational readiness plans and a system transition plan including policies and procedure documentation
- Run System Integration Testing (SIT) and User Acceptance Testing (UAT)
- Optimize and automate system post-roll out
- Train end-users and support staff on system features, functions and processes

## About Consolidated Analytics

Consolidated Analytics is an end-to-end mortgage services platform that delivers value to its clients in origination, servicing, and capital markets, from asset-level analysis to enterprise optimization. A leading provider of real estate valuation, risk management, and advisory services, our comprehensive suite of solutions encompasses due diligence, residential and commercial valuation, collateral risk assessment, and regulatory compliance, enabling our clients to stay ahead in today's dynamic market.



Contact us for more information!

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