![Consolidated Analytics logo]

MORTGAGE SYSTEMS IMPLEMENTATION, CONVERSION, AND OPTIMIZATION SERVICES

Whether you are a mortgage originator or servicer, your workflow system decisions are integral to shaping, improving, and even transforming business strategy. Choosing the right system or third-party support vendor will drastically minimize risk, cost, and business impact. Moreover, implementing, updating, and improving your platforms with the latest workflow technology will optimize your operation, driving productivity and profitability.

Consolidated Analytics' Consulting and Advisory Mortgage Systems Implementation , Conversion, and Optimization Services provide mortgage industry leaders with the knowledge and resources required to evaluate, select, implement, convert -and always- improve mortgage systems.

From Strategy to Execution to Impact

We deliver executable strategies backed by proven project delivery use-cases. With decades of mortgage operations and technology experience, our expert consultants, methodologies, and programs help lenders and servicers drive shorter implementation cycles and deliver measurable outcomes,* such as:

- Increased profitability by 69% for a mid-sized bank

- 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

*Ask us for the details!

OUR SOLUTIONS FOCUS ON:

Strategic Objectives
Whether you are sourcing a new system or upgrading an existing one, our expert consultants and business analysts work with you to create executable programs that align with your business objectives and priorities.

Technical Requirements
Leveraging deep expertise in mortgage lending and servicing technology architecture, infrastructure, data and analytics, automation, coding, and testing, we help you identify and implement best-fit features and functions that maximize your business strategy and technology investment.

Operations and Process Excellence
We develop road maps and plans that prepare your organization for the impact of system change, with an emphasis on regulatory compliance, operational risk, and process improvement opportunities.

Talent and Resources
We ensure a successful system rollout and user adoption by pairing expert consultants with advanced project management tools, communication strategies, and training programs. Our consultants bring specialized knowledge in technology, compliance, operations, and design, garnering trust from our clients to meet technology staffing demands.

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 project road map 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 road map
- 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 polices 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 provides the real estate finance industry with an end-to-end mortgage services platform that delivers value to its customers, from asset-level analyses through enterprise-wide optimization. By harnessing the power of data and technology – and by tapping into the expert insights of our multidisciplinary team – we help forward-thinking companies unlock loan and operational quality, efficiency and performance.

Consolidated Analytics serves clients in mortgage lending, servicing and capital markets. Specific solutions the company offers span across the mortgage value chain and include valuation, business process services, due diligence, consulting and advisory.

Contact us for more information!