



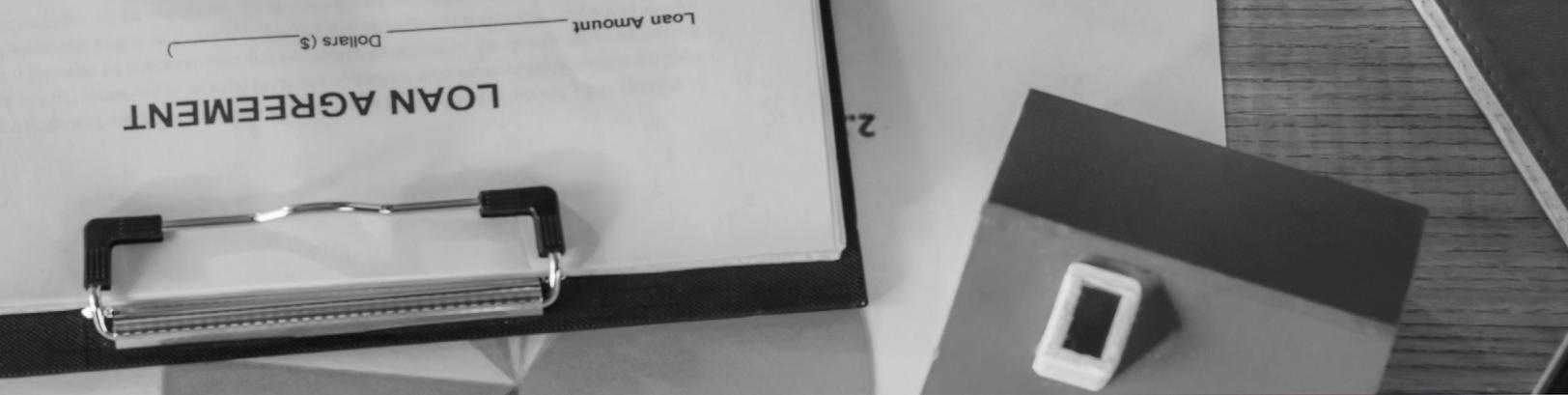
**SYSTEMSOFT**  
TECHNOLOGIES™

CASE STUDY  
**MORTGAGE  
LOAN  
ORIGINATOR**

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## Situation

*A \$100-million, Southeast Regional mortgage loan originator was concerned about the amount of time and cost to intake customer applications for mortgages. The customer application validation process involved at least 10 people who had to use various websites to access and validate lender information.*

Documents submitted by applicants were difficult to assess, then transition into the loan application. The process was not automated and was taking longer to process than its competitors.

Customers were frustrated, and the internal resources were unable to focus on more productive activities, such as sales support and customer service.

## Strategy

System Soft Technologies documented the processes needed for new loan application processing. System Soft also identified specific document types and sub-processes that fit the criteria for business automation through robotic process automation (RPA).

A business case was developed and reviewed with the client's executive team. Immediately, the executives approved commencement of the design, build and deployment of multiple bots spanning initial loan applications and additional processes.

The project required six weeks from requirements through development and deployment.

## Outcome

Seven of the client's loan processors were no longer needed to manage the initial phase of document submission and loan application processing. These people were transitioned to support more strategic processes, such as customer service, sales and marketing. The amount of time required to process mortgage loan origination processes was reduced by three full days, on average.

## Conclusion

Credit Union leaders are challenged to deploy and scale technology to address today's most pressing demands. There are increasing expectations for virtual services by members and employees, coupled with a daunting expansion of unpredictable security risks. Compliance is on the rise and becoming more complex to deliver and manage, while costs are increasing, and scalability and integration of data are more difficult and intricate every day.

System Soft's Banking and Credit Union experts deliver integrated services that use delivery accelerators to support financial services leaders who are looking to aggressively and expeditiously:

### **Adapt**

Establish adaptive workforces and deliver digital workplaces in support of new skills focused on member service, product innovation, member relationship management and digital engagement.

### **Connect**

Build native cloud infrastructure and software architectures that accelerate core modernization, connect ecosystems, eliminate siloes and embrace external financial technology partnerships.

### **Design**

Launch new digital products through innovative engineering that spans design, development and deployment to support speed to market, product agility and customer innovation.

### **Optimize**

Leverage intelligent automation, robotic process automation and analytics fueled by machine learning to drive more efficient operational ratios and member services.

**Financial institutions of all sizes can benefit from System Soft's collaborative customizable financial services solutions. [Contact System Soft](#) to learn more.**

# ABOUT SYSTEM SOFT

## OUR SUCCESS STARTS WITH YOU

At System Soft Technologies (SSTech), we are a family unit powered by diversity, inclusion, transparency, respect, integrity and passion for our clients and our people. Our business growth depends on your professional development, as we collaborate, share ideas and innovation, and invest in our future. By forging a meaningful partnership with our people, we come together with the same purpose, exceeding our goals. This keeps us nimble, ahead of the competition, and on top of our industry. Our continued success begins with you.

### Accelerating Innovation.



Microsoft  
Partner  


Gold Cloud Platform  
Gold Cloud Business Applications  
Gold Cloud Customer Relationship Management  
Gold Enterprise Resource Planning  
Gold Application Development



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