

Pumping Up Productivity and Profit Margins

Union Home Mortgage finds bottlenecks and ups pull-through with Movation Business Intelligence.

Tony Pietrocola and the executive team at Union Home Mortgage had an uneasy feeling they were missing something. Business was good but getting more competitive, and they didn't have visibility into their operations and productivity stats.

They needed answers in real time to questions like what's slowing us down, what's falling out, who is the least productive, and where can we gain efficiencies?

"We've been growing and we've been successful, but we felt like we were flying blind," said Pietrocola who serves as the company's chief information officer. "It was hard to get timely information

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Tony Pietrocola
CIO



WHAT TO LOOK FOR IN A MORTGAGE BUSINESS INTELLIGENCE PARTNER

- 1 Deep experience in the mortgage industry.
- 2 Proven success in improving operations, stabilizing costs and improving margins.
- 3 Investment in product innovation.

on loan stage and status, and what was working and what needed attention."

Headquartered in Strongsville, Ohio, a suburb of Cleveland, Union Home has 160 loan officers among its 350 total employees. The company is growing into a national lender opening up correspondent, wholesale and consumer direct channels in addition to the flagship retail loan officer lending channel.

"In the past we had very basic performance measures for our team, and we simply added to the team when we felt like operations were slowing down," said Pietrocola. "We chose Movation Business Intelligence to help us dive into the metrics and make smarter decisions about our processing and staffing. We've been able to find bottlenecks and improve production levels throughout our company."

ROI – Return on Intelligence

Like any other business investment, there needed to be a solid business case for Movation. Pietrocola says it's definitely there, and it's paying off.

"Performance indicators don't lie and better transparency keeps everyone accountable," said Pietrocola. "It creates healthy competition within the company that naturally raises performance levels."

Movation BI seamlessly connects and pulls data from Union Home's loan origination system, Encompass360, and organizes it into analytics, scorecards, and dashboards for forecasting and performance monitoring. Executives and employees only see the reports they need to see based on team roles and management responsibilities.

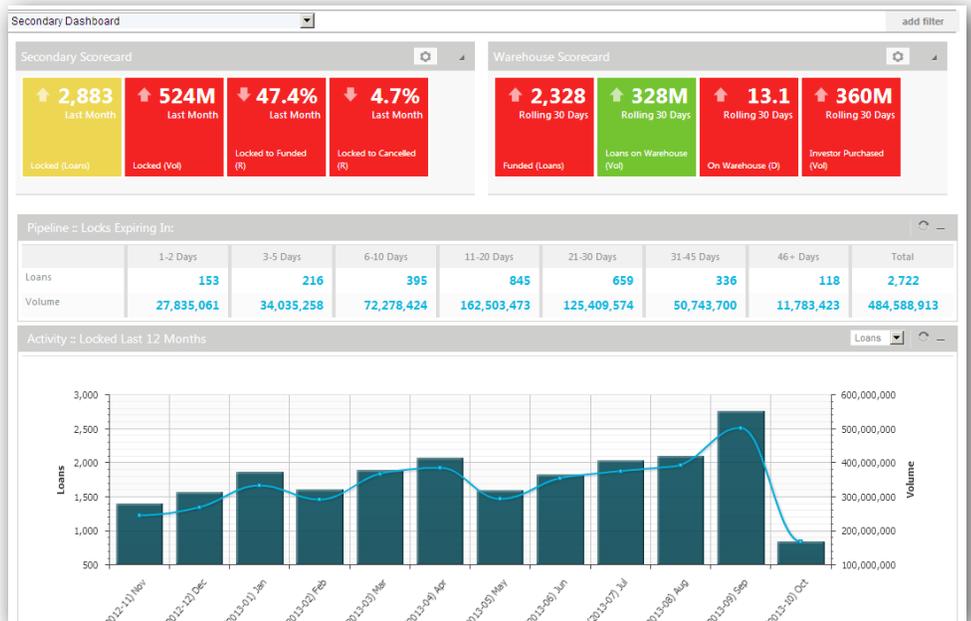
BETTER COMPANY PERFORMANCE: PAINS AND GAINS

PAINS

- Lack of visibility into key performance indicators and productivity.
- Bottlenecks caused lower productivity.

GAINS

- + Company-wide transparency and visibility into key performance indicators like cycle time, pull-through, and loan quality.
- + Improved production levels and efficiencies, and provided better management information.



“We chose Movation for the team behind it, as well as the fact that it’s a very flexible platform, and plugs into our systems easily,” said Pietrocola. “The output is also easy to read and understand at a glance.”

Movation has become mission-critical for Union Home Mortgage. Because it is 100% web-based, real-time information is accessible by company leaders, managers, and front line employees from any device, at any time. Even more important, this same information can be pushed to individuals based on a schedule or an exception event.

Fast and Painless Start, Solid Support

Pietrocola has been involved in many technology implementations throughout

his career. The Movation BI implementation ranks as one of the easiest.

“The people were fantastic, and the project plan was well-designed,” said Pietrocola. “It was much easier to get up and running than I thought it would be.”

And what about when they have questions or need help? Pietrocola says the professionalism continues.

“They’re responsive and they know our loan origination system due to their experience in the industry,” said Pietrocola. “Motivity Solutions has become an important partner for us. They’re giving us great visibility into our operations so we can intelligently run our business, increase productivity, and grow our company profitably.”

“We’ve seen faster closings,” said Pietrocola. “With better visibility into goals, objectives and benchmarks, our team members can see their progress and it motivates them to do even better.”

Designed By Mortgage Lenders, For Mortgage Lenders

There are no manual spreadsheets to update or multiple versions to manage. Pietrocola and the executive team gain instant access and insights into total pipeline activity and can quickly drill down to individual loans when they need more details.

The fact that Movation BI was developed specifically for the mortgage industry, by former mortgage company owners, was a big selling point for Pietrocola.

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