

COLLECTION OF “VOICE OF CUSTOMER” (BORROWER AND BROKER)

Project Goal: 50% Increase in loan volume per broker

Differentiation can no longer rely on service and/or product proliferation; it is now based on the overall experience felt by the customer (Borrowers AND Brokers). In order to enhance differentiation, data collection plans were designed and implemented to clearly understand customer needs and expectations.

Business Case:

- Enhance customer loyalty
 - increase revenue via broker relationship

Six Sigma Improvements:

- Conducted detailed customer survey
- Leveraged findings to:
 - Develop and launch new products to increase referral volume
 - Develop and implement a Referral Tracking System – Broker can access status of deals they referred
 - Provide additional “education” to brokers about various product offerings

Delivered Benefits:

- \$35 million additional volume

PROCESSARC

STREAMLINING FINANCIAL SERVICES