



Intelligent Automation for mortgage companies

Rethink your operating model.
Realize greater value

Mortgage companies are under pressure on multiple fronts – from tackling increasing loan volumes to growing consumer expectations for rapid, personalized support. Meeting these requirements demands flexible, agile, scalable operations – one that reimagines processes from front-end customer experiences to back-end operations.

While Robotic Process Automation (RPA) – automating simple, repetitive, high-volume tasks – helps lower costs and enhance productivity, it's often not enough to transform operations. Intelligent Automation combines RPA with advanced technologies such as optical character recognition (OCR) and artificial intelligence (AI) to automate more complex tasks, driving innovation, agility and speed.

But getting started on Intelligent Automation can be daunting. What business objectives are best served through automation? What are the best-fit technologies? How to quantify benefits? [We are here to help.](#)

Sourcepoint's Intelligent Automation Solutions

Sourcepoint supports businesses in their end-to-end automation journey – from creating an Automation COE to identifying the right-fit opportunities and technologies.



Process analysis

Process re-engineering and automation feasibility study by Lean Certified process experts and Citizen Assessment.



Bot engineering

Process and system design enabled by automation tools combined with human exception handling.



Digital FTE operations

Go live and intelligent performance management through ongoing analytics around efficiency and quality.

A collaborative approach

We work closely with you to identify the best-fit technologies, automate processes, and accelerate time to market.



Transformation advisor

Spanning assessment, target operating model design, and continuous improvement framework



Enablement services

Including process discovery, design and implementation, tool selection, and COE and infrastructure setup.



Managed services

Encompassing digital intake and mailroom services, digital customer support services and business exception handling.



Mortgage automation framework

Our Intelligent Automation framework, designed specifically for mortgage companies, harnesses next-gen technologies (RPA, machine learning, smart workflows and natural language processing) to simplify and automates processes across the mortgage life cycle.

What's more, our team of experts can design and deliver the solutions remotely.



How we do it



Step 1

Using our industry experience of over 25 years and a library of over 500 standard mortgage industry documents, we help you identify areas that will benefit the most from automation.



Step 2

We then re-engineer and simplify your processes to synthesize both structured and unstructured data such as text and images.



Step 3

Finally, we evaluate and pinpoint best-fit platforms, technologies and tools and integrate them with your systems to create a frictionless mortgage journey for your customers.

\$24 Million
Average annual
operational savings

20%
Reduction in
cycle time



60%
Lower onshore
headcount

250%
Improvement in
associate productivity

Take mortgage automation to the next level.

Know More 