

DIGITAL MORTGAGE PROCESSES LIVE

Enhancing Customer Experience and Efficiency through Automation, Self Service and Data

16 February 2021 | Free Online Digital Event

Mortgage providers are faced with a challenging environment with increased competition, uncertain market conditions, increased regulatory requirements and in many instances' higher costs. In this context, end-to-end digital mortgage processes offer the best means by which to achieve the sometimes-contradictory goals of improving customer experience while enhancing efficiency and reducing costs.

Speakers confirmed:

Katherine Campbell, Chief Digital Officer, **Assurance Financial**

Nikhita Iyer, Strategic Business Development, **Moxtra**

Srikant Iyer, Head of Home Lending Originations Product Strategy & Transformation, **Wells Fargo**

Amitabh Ghatak, Chief Product Officer, **Molo Finance**

Sponsored by: **Moxtra**



DAY ONE | 16 FEBRUARY 2021

09:00 EST Developing a Roadmap to Enable a Digital Mortgage and Create a Sustainable, Simple Solution

Defining the strategy is an integral first step in developing the roadmap and identifying potential challenges within the digital mortgage process. Lenders must forge a path to digitization or risk becoming irrelevant. This session will address:

- Acting on the immediacy to leverage a more digital & engaged option opposed to a high-touch engagement model with customers
- Creating a more collaborative and engaging model where information will be exchanged and shared rather than simply supplied by the consumer
- How to minimize the impact on the customer without sacrificing loan quality and compliance

Srikant Iyer, Head of Home Lending Originations Product Strategy & Transformation, **Wells Fargo**

10:00 EST Fireside chat: Leveraging Digital Channels to Build Persistent Customer Relationships in the Mobile Era

Traditional Mortgage processes are involved, document heavy workflows. As today's businesses prepare for their future in today's digital landscape, mortgage firms and their client-centric operations must also evolve to meet consumer expectations. However, the right digital strategy is crucial in order to maintain a centralized, secure service, while offering customers convenient access to the organization. In this session, Moxta's Nikhita Iyar will discuss the evolving customer journey in the mortgage space, the challenges in building a digital strategy for mortgage firms, and how businesses can transform to become digitally resilient. Iyar will demonstrate how your brand can be redefined through digital and the importance of offering your customers your own branded OneStop portal that is managed and secure. With a focus on providing customers with the ultimate convenient experience, digital resilience is timely in today's Covid-19 landscape, and beyond.

Speaker: **Nikhita Iyer**, Strategic Business Development, **Moxtra**

11:00 EST Maximising the Technology Adoption Journey to Deliver ROI and Positive Net Gain

Assessing an end-to-end composable business model allows banks to focus on developing strong relationships with their customers and move its employees to more value-based tasks.

Taking advantage of coupling different technologies can reduce processing timelines and drive greater cost control for long-term success and sustainability. This session will address:

- Coupling different technology solutions in mortgage lending
- Utilising technology as an enabler - delivering enhanced services to achieve continuity in the digital mortgage experience
- Understanding how to shift to an integrated and connected ecosystem for less re-work, enabling agility and implementation of new tech capabilities

Katherine Campbell, Chief Digital Officer, **Assurance Financial**

12:00 EST Cultivating an Internal Collaborative Approach to Execute a Seamless End-to-End Digital Mortgage Process Ecosystem and Experience

Considering the entire ecosystem, incorporating both customer-facing and back-office digital capabilities to drive automation, quality, and efficiency is key. This session will address:

- Assessing how to drive front and back office mortgage operational excellence and collaboration for efficiency and profitability
- Understanding the customer to offer a faster, simpler, and cheaper mortgage experience
- How to embrace and adopt a 100% digital mortgage - Determining where in the back office to best apply digital solutions to deliver on promise to the customer

Amitabh Ghatak, Chief Product Officer, **Molo Finance**