

# TRANSFORMING MORTGAGE ORIGINATION WITH AI AUTOMATION

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## CHALLENGES

- Delays and customer frustration in the origination phase of a prominent mortgage lender's operations.
- Manual prequalification processes and document handling, thus leading to inefficiency.

## SOLUTION

- Architected, designed, and implemented an AI chatbot fine-tuned for mortgage rules as proscribed by Fannie Mae and Freddie Mac for customer prequalification queries and document submissions.
- Integration of a Document Validation Tool powered by advanced AI algorithms to ensure document authenticity and completeness.

## KEY OUTCOME

### 1. Efficiency Improvement

Prequalification and document submission times cut in half.

### 2. Enhanced Accuracy and Data Integrity

Document validation tool ensured authentic and complete submissions.

### 3. Customer Satisfaction and Trust

The streamlined origination process improved customer experience and reduced frustration.



## AT A GLANCE

### CHALLENGES

- Delays
- Customer Dissatisfaction
- Inefficiency

### RESULTS

- Reduced prequalification and document submission times by 50%, optimizing operational efficiency.
- Enhanced overall effectiveness of the origination process through accurate data validation capabilities.



## APPLIED AI CONSULTING

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