



# CASE STUDY | SCALING A US-BASED MORTGAGE TEAM WITH CONNEXT



# CLIENT OVERVIEW

A US-based mortgage company, experiencing rapid growth and increasing demand, needed to scale its operations to meet customer needs while managing costs. The company required a team of skilled professionals, including customer service representatives, mortgage processors, and team leaders, to handle the growing workload efficiently. To achieve this, the mortgage company partnered with Connex Global Solutions to build a custom, dedicated team in both the Philippines and Colombia.

## CHALLENGES

**Rapid Growth and Customer Demand:** The company was facing an influx of mortgage applications, making it essential to scale operations quickly to avoid delays in processing and customer service.

**High Labor Costs in the US:** Staffing locally was expensive, particularly for roles like mortgage processing and customer service, which required specialized knowledge and constant communication with customers.

**Quality and Efficiency Requirements:** The mortgage company needed to maintain high standards of accuracy and efficiency in processing loans, requiring a skilled workforce capable of handling complex tasks.

# SOLUTION: PARTNERING WITH CONNEXT GLOBAL SOLUTIONS

To address these challenges, the mortgage company worked with Connex to build a custom, dedicated team of customer service representatives, mortgage processors, and team leaders in the Philippines and Colombia. This offshore team allowed the company to scale rapidly and save significantly on staffing costs.

## 1. Custom-Built Team of Mortgage Professionals

Connex provided a tailored solution, building a dedicated team to meet the company's specific needs.

**Customer Service Representatives:** The offshore team handled inbound and outbound customer inquiries, providing timely and accurate responses to questions about mortgage applications, payment processing, and loan status.

**Mortgage Processors:** The team of mortgage processors was trained to handle the intricate details of loan applications, including reviewing documentation, verifying financial information, and ensuring compliance with regulatory requirements.

**Team Leaders:** Experienced team leaders in both the Philippines and Colombia oversaw the daily operations, ensuring that service levels were met and that the offshore teams maintained the same high standards as the local staff.

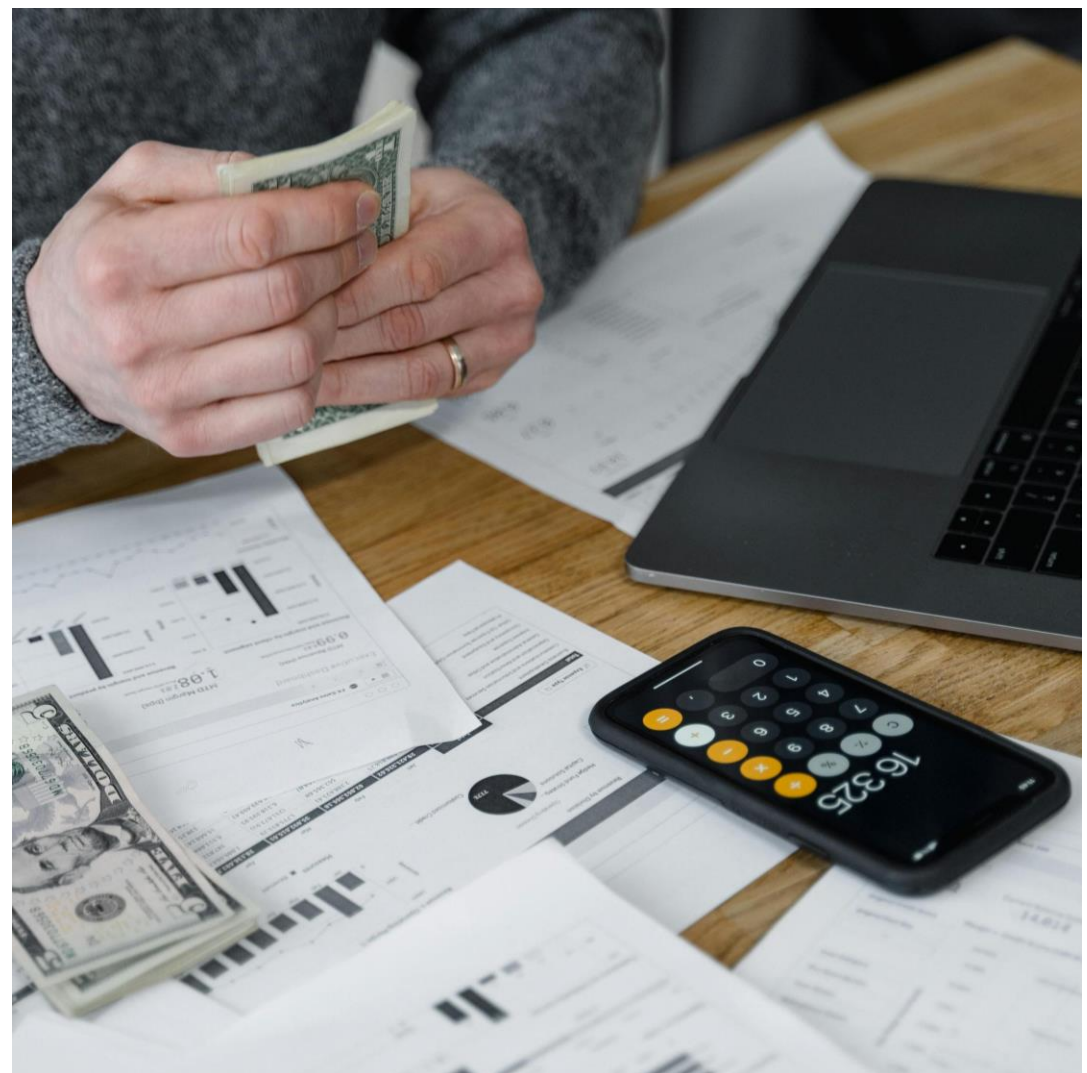


## 2. Cost Savings of Up to 70%

By leveraging Connext's offshore talent, the mortgage company was able to save up to 70% on staffing costs compared to hiring locally in the US.

**Reduced Labor Costs:** The lower cost of living in the Philippines and Colombia enabled the company to build a large, skilled team at a fraction of the cost, helping them achieve operational efficiency without sacrificing service quality.

**High ROI:** The cost savings allowed the company to invest in technology upgrades and improve its overall customer experience, further fueling growth.



## 3. Rapid Scalability to Meet Customer Demand



Connext enabled the mortgage company to scale its operations quickly, hiring and onboarding skilled professionals in a short time frame to meet the growing demand for mortgage services.

**Fast Hiring:** Connext's extensive talent pool in the Philippines and Colombia allowed the mortgage company to rapidly expand its team, reducing the time it took to onboard new employees.

**Flexibility:** The company was able to quickly adjust the size of the offshore team in response to fluctuations in demand, ensuring they had the right number of staff during peak periods.

## 4. Maintaining High Standards of Accuracy and Efficiency



Connex ensured that all offshore team members received extensive training in mortgage processes, compliance, and customer service standards, helping the mortgage company maintain high levels of accuracy and operational efficiency.

**Training Programs:** Connex developed customized training programs to equip team members with the knowledge needed to handle mortgage processing tasks, including complex regulatory requirements and customer service best practices.

**Quality Assurance:** Ongoing quality checks and performance evaluations were conducted to ensure that the offshore teams consistently met the company's standards for accuracy, compliance, and customer satisfaction.

# RESULTS

**70% Cost Savings:** By building a dedicated offshore team in the Philippines and Colombia, the mortgage company achieved significant cost savings, allowing them to reinvest in technology and other growth initiatives.

**Rapid Team Expansion:** With Connex's support, the company was able to quickly scale its team to meet rising customer demand, ensuring no delays in mortgage processing or customer service.

**High Customer Satisfaction:** The offshore team maintained high service standards, providing accurate and timely processing of mortgage applications and ensuring that customers received prompt assistance with their inquiries.

**Operational Flexibility:** The ability to rapidly scale the team up or down in response to changing demand allowed the company to maintain operational efficiency, even during peak periods.

# CONCLUSION

Partnering with **Connex Global Solutions** enabled the US-based mortgage company to build a custom, dedicated team of customer service representatives, mortgage processors, and team leaders in the Philippines and Colombia. This partnership allowed the company to save up to 70% on staffing costs while scaling rapidly to meet growing customer demand. With Connex's support, the mortgage company was able to maintain high levels of accuracy, efficiency, and customer satisfaction, positioning itself for continued growth in a competitive market.



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