



## ABOUT THE CLIENT

A US-based, full-service mortgage lender.

## CLIENT CHALLENGE

Not all customers who embark on a relationship with the client by applying for a refinance mortgage loan, complete the process. Regardless of reason, when customers do not complete the mortgage process, it is incredibly costly from an operational and time standpoint. Our client sought to understand how elements of the current customer experience may be contributing to this fall out—whether due to the account being cancelled or withdrawn – and implement strategies to improve it.



The interviews provided much insight into challenges in the customer experience.



## THE SUTHERLAND TRANSFORMATION

Sutherland hosted the client in our innovation labs to conduct a journey mapping exercise to understand why customers cancel or withdraw their loans in the mortgage process. The client was joined by a team of unbiased design researchers, a team of mortgage bankers, and process experts from Sutherland for expert guidance on assessing the customer experience. Following a journey mapping session, Sutherland conducted field research by interviewing 12 customers to understand the root causes of why they cancelled or withdrew their loans. The interviews provided much insight into challenges in the customer experience including communication barriers, financial struggles, logistical challenges in the mortgage process, and more.

## PARTNERSHIP RESULTS

As the result of the customer journey mapping and design thinking exercises, our client will receive the following results:

**20+**

improvements will be implemented in the customer experience

**ENHANCED**

customer communication

**INCREASED**

customer empathy

Customer Experience  
Design  
Consulting & Research

For more information on how we can help you transform your processes, visit us at [www.sutherlandglobal.com](http://www.sutherlandglobal.com), email us at [sales@sutherlandglobal.com](mailto:sales@sutherlandglobal.com), or call 1-800-388-4557 ext. 6123.

As a process transformation company, Sutherland rethinks and rebuilds processes for the digital age by combining the speed and insight of design thinking with the scale and accuracy of data analytics. We have been helping customers across industries from financial services to healthcare, achieve greater agility through transformed and automated customer experiences for over 30 years. Headquartered in Rochester, N.Y., Sutherland employs thousands of professionals spanning 19 countries around the world.