



# Next Generation Mortgage and Loans 2018

Client Expectations Analysis  
Report Abstract

October, 2018

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36 pages

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## Background and Scope

As part of NelsonHall's most recent Next Generation Mortgage and Loan BPS market analysis, in addition to interviewing over 20 of the leading mortgage and loan BPS services providers globally, our research extended to a survey of these vendors' clients. Through this survey, we met with 20 clients of these vendors, representing a range of geographies, industries, size, scope of services, and various levels of maturity in their sourcing of M&L BPS.

Each interview was conducted to cover several focus areas, to gain a comprehensive understanding from the client perspective including their experience as a buyer of M&L BPS services in the current marketplace. This was specifically designed to understand, not only the perception of vendor performance in meeting client needs currently, but also their ability to meet the clients' needs in the future. The survey focused on the following key areas:

- 1.M&L BPS services usage
- 2.Benefits derived from M&L BPS
- 3.Vendor approach to benefit delivery
- 4.Client satisfaction
- 5.Client future expectations and vendor ability to meet these future requirements.

For each of these focus areas, we asked clients to rate various attributes including services used, services satisfaction, benefits sought, benefits importance, vendor approach, and overall performance satisfaction



## Key Findings

Overall, clients wanted greater collaboration from vendors in identifying best practices and innovative ways to improve processes going forward. Clients want faster implementation of best practices for process execution, increased automation of manual processes, and improvements to labor force management to drive cost down.

Clients were willing to make a positive recommendation where the vendor met client expectations and delivered value beyond initial client expectations. Clients repeatedly expressed frustration at vendors not providing as much feedback on best practices and new offerings in transformational elements used for delivery.

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- 2A. Mortgage and Loan BPS Offerings

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- 2B. Client Perception of Benefits: Importance and Effectiveness

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- 2C. Vendor Approach to Benefit Delivery

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- 3. Ability to Meet Future Client Needs

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- 3A. Key Mortgage and Loan BPS Service Issues & Initiatives

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- 3B. Vendor Mechanisms

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- 3C. Mortgage and Loan BPS-Related Capabilities

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## Report Length

36 pages

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