

# CASE STUDY

LAUNCHING A NEW  
FINTECH-ENABLED BUSINESS

UNION PLUS MORTGAGE COMPANY

# ABOUT

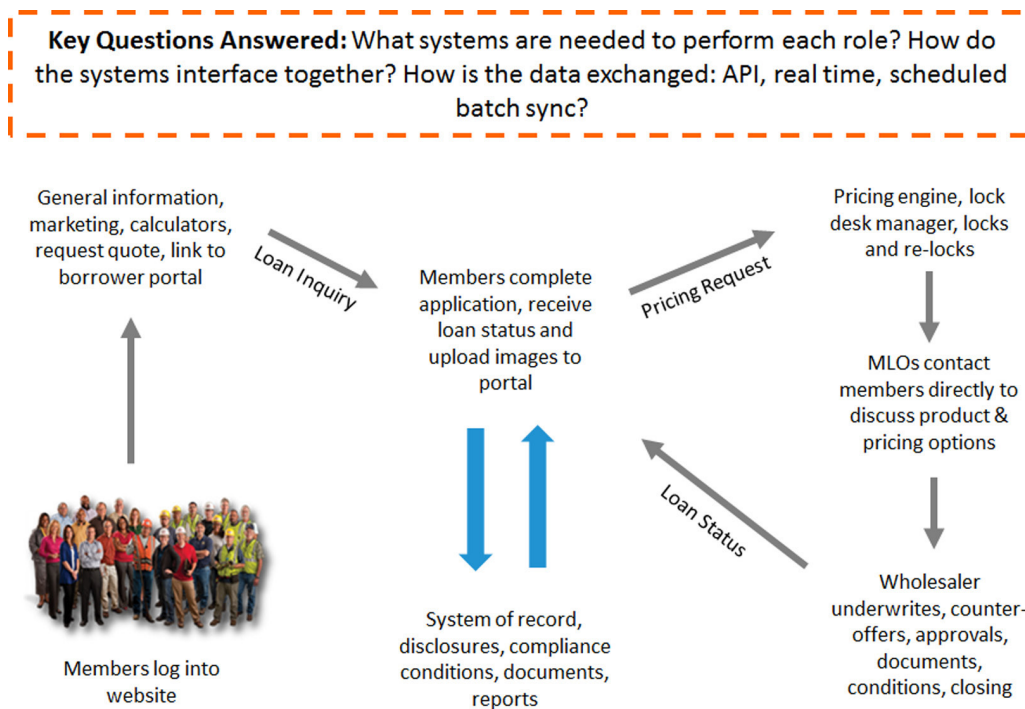
When startup mortgage broker Union Plus sought to launch a modern call center for generating new loan applicants, they turned to CC Pace. Tapping our expertise in market research and industry trends, Union Plus engaged us to develop a scalable, best-of-breed systems strategy tailored for their needs.

Leveraging our technical roadmap and optimized workflow model, Union Plus successfully rolled out their ambitious call center initiative. Powered by CC Pace's strategic guidance, they equipped their operation with exceptional customer service capabilities from day one. The intelligent plan provided Union Plus with the ideal technology foundation and operational framework for efficiently scaling their fledgling call center operations.

# THE SITUATION

Union Plus had a bold vision- delivering a seamless mortgage experience for AFL-CIO members. They aimed to craft a uniform customer journey from initial inquiry through closing, accessible from a single portal. To bring this ambitious plan to life, Union Plus needed expert guidance on selecting the ideal systems. They sought seasoned market research and analysis to inform technology decisions for their fledgling mortgage brokerage.

By engaging CC Pace, Union Plus gained a trusted advisor to shape strategies for a best-of-breed technical architecture. Our insights would prove invaluable for strategically guiding systems selection and creating a future-ready technology framework capable of powering Union Plus' vision.



# THE SOLUTION

CC Pace spearheaded a multifaceted initiative, providing:

- Customer experience storyboarding to map the ideal borrower journey.
- Analysis of alternatives to handle leads without an external CRM system.
- Comparison of FinTech portal solutions capable of delivering the desired experience out-of-the-box.
- Evaluation of LOS options suited for the lending model.
- An optimized workflow to manage loans end-to-end.
- A comprehensive technology roadmap and implementation plan tailored to Union Plus' needs.

# THE RESULTS

Our extensive expertise enabled delivery of well-rounded guidance. By leveraging CC Pace's storyboard, vendor analyses, workflow optimization, and actionable roadmap, Union Plus gained the strategic insights required to build their ideal technology architecture from the ground up.

- Union Plus successfully launched their new mortgage brokerage line of business, expanding services for members.
- Just 15 days after launch, Union Plus cleared their first loan to close- an exceptionally fast ramp-up demonstrating the effectiveness of their systems strategy.
- Powered by CC Pace's research and planning, Union Plus hit the ground running with an optimized technology framework and workflow designed for efficiency and scalability.
- Their innovative borrower portal provides a unified customer journey delivering convenience and transparency.

In summary, Union Plus achieved speedy market entry and gained long-term capabilities to continue excelling in service to their members. CC Pace's expertise was instrumental in building the ideal technological foundation and operations model for an ambitious startup venture.

**CONGRATULATIONS**



YOUR LOAN WAS  
CLEARED TO  
CLOSE IN LESS  
THAN 15 DAYS!



## ABOUT UNION PLUS

Union Plus Mortgage Company was founded by the AFL-CIO to provide current and retired union members and their families with mortgages through a union-controlled company. Their mission is to provide union members with the best available mortgages, great customer service, and access to the unique Union Plus Mortgage Assistance Program, which provides members with hardship benefits.

## ABOUT CC PACE

CC Pace is a business and technology consulting firm headquartered in Fairfax, Virginia. For over 40 years, CC Pace has built its reputation on an unwavering commitment to customer satisfaction and is nationally recognized for solving business problems and delivering high-impact results. CC Pace specializes in the mortgage banking and financial services industries and our clients appreciate that we have a deep understanding of their business. Our domain experience allows us to design solutions to not only meet their needs, but achieve both measurable bottom-line results and significantly improve business execution.