



Case Study

Financial Institution

CLIENT

This Financial Institution's (FI) mortgage subsidiary is one of the largest home lenders in the United States.

NEED

The FI mortgage subsidiary had seen its loan volume decline as the nationwide mortgage refinancing boom cools. In order to maintain its position as a leader in the market, FI sought to maximize salesperson productivity. The company's national sales management team launched an initiative to:

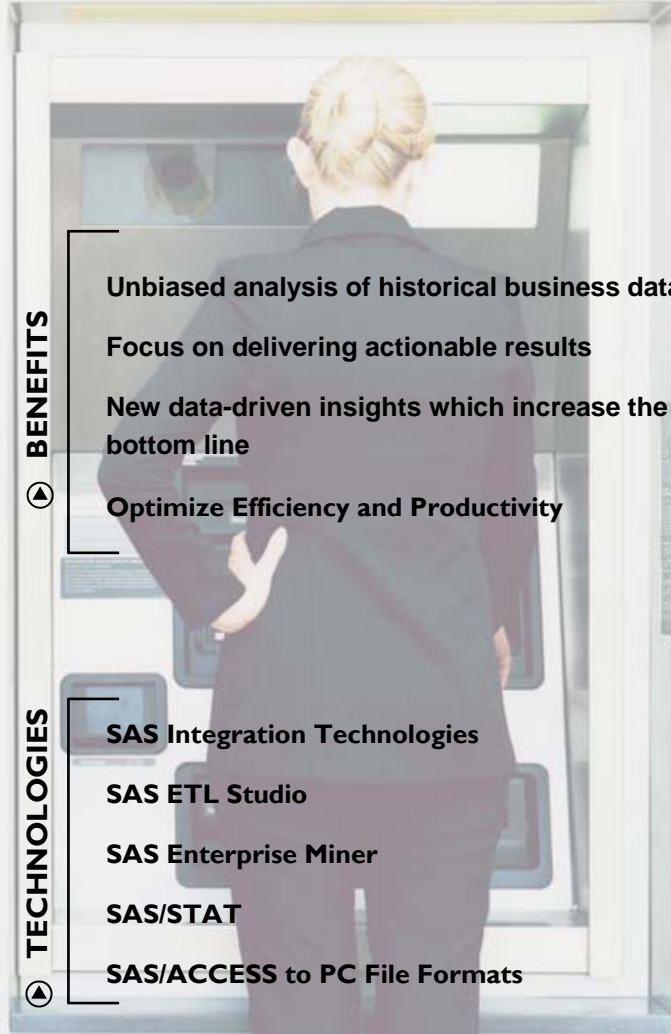
- compare different existing branch operating models, and
- identify the model(s) which facilitate maximum salesperson productivity.

SOLUTION

Pinnacle Solutions developed the analysis strategy, consolidated & prepared FI's historical sales data, and conducted the analysis using SAS Enterprise Miner. Our team uncovered insights about FI's branch operating models which were previously unknown to the sales management team. Those insights are now driving new employee training initiatives and further data exploration which the company expects to have a positive impact on the bottom line.

Business Intelligence Solutions:

▶ Business Process Assessment



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