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Encompass Project Overview



The matchbox process

This presentation has been created to assist you with an overview of our Encompass implementation process.

With over 700 *Encompass Implementations and Reconfigurations and over 1,000 Encompass projects*, we have been part of the triumphs and pitfalls of successful implementations and reconfigurations.



The matchbox process

Our process has been developed to allow the matchbox team to provide the roadmap for a successful reconfiguration

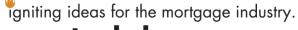


All Implementations Are Not Equal

matchbox reconfigurations are carefully curated to cover ALL aspects of mortgage operations from IT infrastructure to LO Training. So what is included in your implementation package?

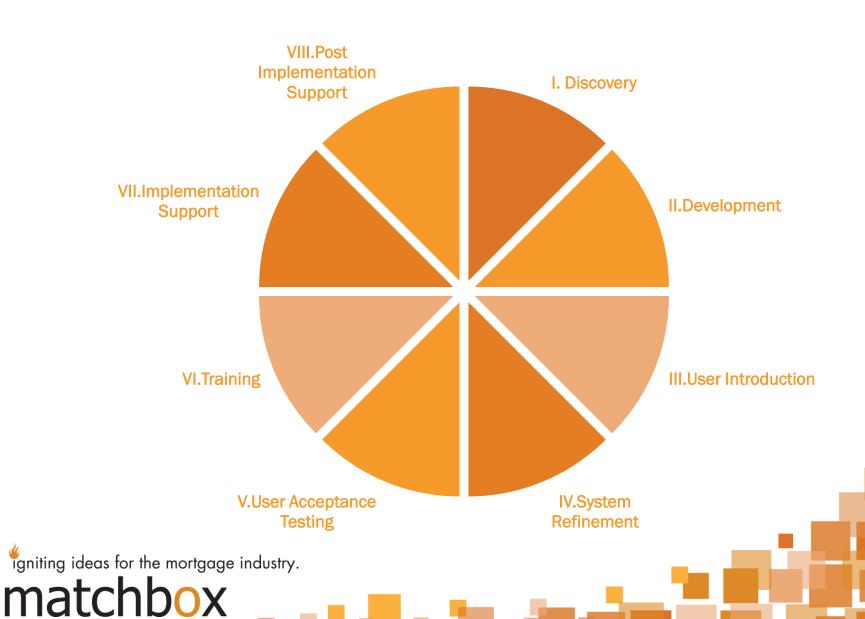
Our implementations include:

- -A set of 25 custom, best practice forms to maximize efficiency and the User Experience
- -Full Operational assessment and customization recommendations specific to your business model requirements
- -All business rules, logic and workflows are built with system performance in mind
- -Establishment of detailed project plan including staged roll out for all channels and branches
- -Focus on Retail, Wholesale and Correspondent needs and operational workflows
- -Lights Out' Integrations with all vendors/partners e.g. Warehousing, QC, Servicing, Core Banking Systems, custom PPEs, internal databases etc
- -Dedicated Secondary resource to address all Secondary, PPE, and Encompass based Secondary requests
- -Onsite and remote training for all departments, including branded training materials/desk guides
- -Full service support through implementation and post-implementation
- -Training of Encompass Administrators with fully documented knowledge transfer and virtual Admin support
- -Dedicated 'hands on' Project Lead who is your Project Manager they do more than coordinate phone calls
- -Establishment of system and change control protocols from DEV to UAT and Production





The matchbox process







DISCOVERY

OBJECTIVE: to learn how you currently do your business today. We want to understand how your business model operates from loan origination through loan purchase.

We also want to see the tools and systems you are using but more importantly, we want to see what you are not running through your current LOS.

It is our goal to incorporate all external manual processes (checklists, external spreadsheets) into your Encompass environment. The discovery process allows us to learn what these items are.





DEVELOPMENT

OBJECTIVE: To customize the Encompass environment to support your business model.

This process will utilize our Triangle concept which has been built over years of development to provide the foundation for your introduction into the system.



matchbox triangle model



igniting ideas for the mortgage industry.

matchbox



USER INTRODUCTION

OBJECTIVE: To introduce your Encompass environment that has been customized for you and your business model.

This process will introduce the system with your in house experts in each department to review and compare the system configurations to their expectations. The system will be reviewed for customizations that have been completed and additional items that are needed.



The matchbox process SYSTEM REFINEMENT

SYSTEM REFINEMENT

OBJECTIVE: To go back into the lab to make the requested enhancements and get the system ready for your team to test drive.

This process will be interactive as development is completed. We will work with your team to make sure the system has been updated to your requests.



The matchbox process USER ACCEPTANCE TESTING



USER ACCEPTANCE TESTING (UAT)

OBJECTIVE: For users to access the system with real life loan scenarios to ensure the system is performing as expected.

This is usually a turning point in an implementation project. We will provide with the play book for UAT but you know your business the best and you will be needed to run the key scenarios from beginning to end.



USER ACCEPTANCE TESTING (UAT)

UAT CORE PRINCIPALS:

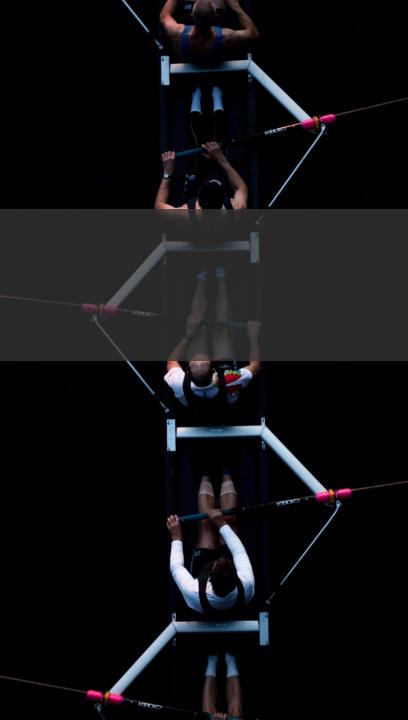
Clients that only have a few people run through a "Conventional Purchase" and say their testing is complete do not have an easy implementation

UAT needs to cover
everything from a user
perspective:
Loan origination, review of
client experience, disclosure
issuance, Change of
Circumstance,
Vendor integrations,
document generation, client
interaction, locking a loan,
etc.



The matchbox process TRAINING





TRAINING



OBJECTIVE: To introduce your Encompass system to your team and your corporate trainer to educate them on the benefits and features that have been built for them

Training is also a crucial part of the implementation process. The matchbox university process involves a system overview of the Encompass system and terminology and specific departmental training

matchbox will provide training materials to help start your Encompass library, including: How To Manuals & User Guides and provide a Train the Trainer process.



IMPLEMENTATION SUPPORT

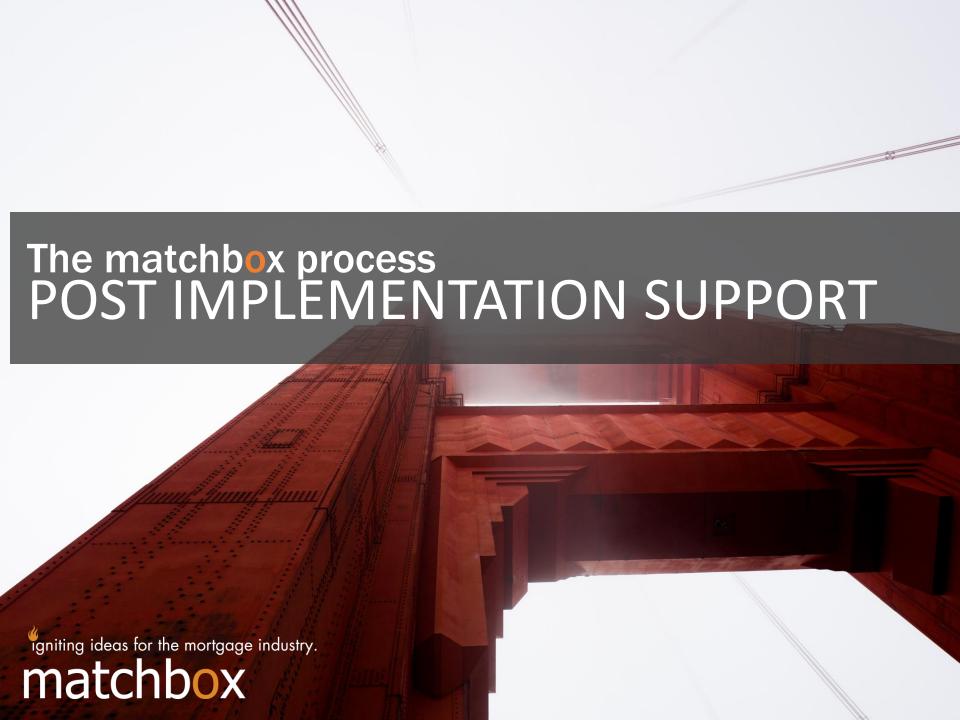
OBJECTIVE: To prepare you and your company for a companywide introduction of Encompass

The implementation process includes a number of items that we will collectively decide upon and complete for your implementation:

- Creation of implementation plan
- Creation of Encompass test environment
- Implementation of Support protocols

- Implementation of Support log and tracking processes
- Implementation of Change management controls
- Implementation of scheduled support calls with Matchbox





POST IMPLEMENTATION SUPPORT

OBJECTIVE: To support you and your team through the implementation of Encompass **AND** transition the knowledge to allow you to support the system in the future

The post implementation process is a 30 day period where we will work together on both introducing the system and completing the requested support requests. This process will start with us completing the majority of the support requests and hopefully conclude with you completing the majority of the requests.

This process will start with matchbox addressing the majority of the support requests and transition to your Encompass administrator to assist them in being able to address. During this process we want to both support and enable you. We will work together to find the right balance.



POST IMPLEMENTATION SUPPORT

- The last part of the project includes a visit to the matchbox office to provide a two day knowledge transfer.
- We will provide you with a physical and digital binder of all of the customization items that have been completed for your project.



