

Journey to digital transformation

Seeking solutions to support growth and customer satisfaction

The art of the possible

“We walked into the project knowing we had to solve certain challenges. Working with Clearsulting, we got fresh perspective—seeing things we hadn’t before and learning that solutions work beyond just what you think you need.”

— Allen McAnally, Chief Financial Officer

Investing in digital transformation

Proctor Loan Protector, a leader in providing insurance products and services to banks, loan originators, mortgage servicers, property investors, property and casualty agencies, and government entities, has embarked on a digital transformation journey. Amid rapid internal and market share growth, their previous technology stack caused challenges as business needs continued to evolve. Investing in digital transformation was critical—starting with optimizing client-facing and internal processes for an enhanced customer experience and fast turnarounds for individuals undergoing life challenges.

Leaning on partnership

After Proctor Loan Protector performed an inventory of their processes needing improvement, streamlining their loss draft check deposit and client support ticketing processes made the top of the list. Hoping to kick off vendor selection internally, competing priorities hindered their ability to move quickly. Looking to accelerate project timeline for the solutions that could best address their challenges, they came to Clearsulting.

Clearsulting begins every engagement the same—with a fit-gap analysis that underpins current-state requirements and challenges with a mind for creating future-state, long-term success. Partnering across operations, finance, technology, and compliance departments, we documented existing pain points, technology, and regulatory requirements to collaborate on key design decisions that would optimize overall customer satisfaction.

Finding the right fit

A 3-pronged approach

1. **Current state analysis:** We evaluated high-level critical requirements to identify suitable vendors and solutions for the RFP process. Because of their niche business specialty and compliance requirements, Proctor Loan Protector prioritized visibility into their data, making reporting and dashboarding capability a key component of their software decision.
2. **Managing RFP + selection:** Understanding Proctor Loan Protector's risk acceptance, we engaged with over 20 vendors, facilitated demos, and recommended technology partners that best fulfilled all organizational requirements.
3. **Aligning stakeholders:** Keeping everyone on board, we developed a roadmap of distinct process improvement recommendations over multiple, bite-size phases. As a third-party, Clearsulting offers a unique perspective of what's possible—considerations that are hard to see among the day-to-day.

Problems? Solved.

We identified over 40 pain points and 110 unique requirements, landing on a Remote Deposit Capture (RDC) technology to expedite check deposits and a ticketing solution to streamline their over 400,000 annual client inquiries. But technology also offers a lesser-known benefit: increased employee satisfaction as the manual tasks decrease.

What's next

Proctor Loan Protector has only scratched the surface of their technology journey. Anticipating more growth, they look forward to the long term benefits their software can provide—and where to innovate next.

To see more case studies, visit:
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Industry: Insurance services

Employees: 1,400

Geographies: United States

Challenges:

- Niche business specialty and compliance requirements
- Prolonged loss draft process
- Inefficient client tasking technology

Solutions:

- Remote Deposit Capture (RDC)
- Client ticketing solution

Results:

- Automation increasing customer morale
- Future state design and roadmap
- Scalable processes and increased customer visibility