

# Giant Mortgage Lender UWM Sought Real Time Intelligence

How an 8,000-agent wholesale mortgage lender is trying to improve agent performance with real-time stereo recording and conversational analytics



## OVERVIEW

Prior to OrecX (recording) and CallMiner (conversational analytics), this large wholesale lender had challenges tracking client experience holistically and in a timely manner. They were capturing all calls but not performing any analytics on those interactions.

The company sought to advance its customer service operation with real-time intelligence so it could drive agent performance improvements intraday.

“With our sales teams, we set different expectations on different days, depending upon what we seek to achieve,” said Melissa Fairbrother, Team Lead. “Having real time coaching feedback (from real time recordings) enables us to improve how our agents are performing as the day goes on, instead of waiting until the next day or week. Now, we can run analytics as calls unfold and update coaching points and expectations during the day to make in-the-moment improvements in agent performance and customer service quality.”

*“We are trying to take our client service operation to the next level, and real time recording and analytics is helping us do that by enabling us to track different performance categories and service perspectives than we had access to before.”*

**Melissa Fairbrother, Team Lead**

# SOLUTION

With real time recording (Oreka TR – Total Recording and Oreka AC – Audio Capture) and CallMiner Coach, Analyze and Visualize, UWM can look at client experience as a whole rather than a needle in a haystack approach. Previously they couldn't identify all the call types they wanted to uncover. Now they can monitor interactions on a grander scale with larger call volume – upwards of 60,000 calls a day. "Live monitoring is also very helpful for our teams," said Ian Heslinger, Team Lead, CX Scoring. "Our supervisors and team leads can listen in to a call live and provide immediate feedback on improving service as opposed to meeting with the agent post-call."

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# METRICS



**8,000**

in-house agents in  
Michigan



**60,000**

Customer calls a  
day on average

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# CONCLUSION

"Real-time stereo recording and conversational analytics enable us to be proactive instead of reactive in our training, compliance and client experience," Fairbrother added. "We can record agents and customers separately and be able to immediately determine which party brought something forward. We want to be on offense when bringing up new products. OrecX and CallMiner enable us to be proactive and to train accordingly."

"Analytics is the number one thing we sell to our clients in terms of customer service and being there for you to answer every call," added Fairbrother. "With OrecX and CallMiner, we can now be very detailed and timely in letting our clients know if something isn't working, so together we can make real-time improvements."

