



customer success story

PANORAMA MORTGAGE GROUP

about panorama

Panorama Mortgage Group, headquartered in Las Vegas, Nevada has four unique brands that operate throughout the United States. Panorama's mission is to provide superior service across their group of mortgage brands with the ultimate goal of empowering mortgage professionals to maintain their own processes, culture, and identity.



Industry: Mortgage/Lending

Headquarters: Las Vegas, NV

Company Size: 800-1,000 Employees

Website: www.panoramamortgagegroup.com

Solutions: Process Documentation, RPA design, UiPath software installation, change management



the challenge: improving customer service as costs increase

Panorama thinks differently about how they help their customers finance homes. Panorama didn't care to reinvent a broken lending industry, instead opting to compete in a new, digital marketplace with common sense and practical customer-centric solutions. In order to be a market leader, Panorama wanted to address:

- Ease of ensuring customer data security while obtaining accuracy and completeness
- Manual effort required to ensure timely and responsive customer interactions
- Redundant interactions between loan processors, customers, and decision makers



the solution: document, automate & implement an rpa solution

After consulting with Neostella to select UiPath as their new RPA tool, Panorama partnered with Neostella for multiple in-depth discovery sessions to:

- Generate and formalize lending application processes including document retrieval, certificate ordering, and process management that could be easily translatable into UiPath
- Design 'to-be' digital process for internal use inline with company growth objectives
- Implement UiPath software solutions applicable for Panorama
- Creation of UiPath bots which would automate manual tasks, freeing up time for more complex, valuable work



the results: greater workflow productivity

With a tailored UiPath solution, Panorama has witnessed:

- Improved worker experience through the elimination of redundant processes
- Increase in application processing speed due to process automation, resulting in greater customer satisfaction and ROI
- Boosted accuracy in processing lending applications, backorders, orders en route, and other logistics metrics that evaluate the production process
- Positive ROI for cost of UiPath implementation

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Neostella really set the bar high for project organization. All milestones were kept on track without surpassing the designated timelines that we established together. They strategized thoughtfully when it came down to reshaping our processes in UiPath and were always eight steps ahead of our team when it came to forecasting our long-term business objectives.

Brad DeBroux

Chief Technology Officer | Panorama Mortgage Group, LLC



IMPROVING YOUR BUSINESS



Neostella is a global automation consulting, implementation and custom development firm. We take a customer-centric approach with our automation services and will work closely with your team to identify opportunities for better efficiency, to refine your processes, and to create unique solutions designed to meet your business needs. With office locations in North America, South America, Europe and Asia, our global team offers ongoing 24/7 support, ensuring long-term success after you go live.