



The Leader in Mortgage Technology Training

DCSI is the Nation's premiere provider of customized training to the financial services industry. For more than a decade we have delivered instructional design and training services that help financial services companies nationwide maximize the potential of their resources – both human and technological.

DCSI has worked with many of the largest mortgage lenders, all of the largest LOS providers and numerous Fortune 500 companies. This close interaction with industry leaders has honed our expertise in mortgage services

- ❖ **Customized Training for LOS Rollout**
DCSI has helped dozens of leading lenders succeed by creating a customized plan for implementation, conversion, rollout and maintenance of a LOS initiative.
- ❖ **Customized Mortgage Services Training**
We help financial services companies improve operational efficiencies and service through training in customer service, sales, loan servicing and other processes.
- ❖ **How DCSI Delivers**
Our award-winning team of instructional designers, training specialists and industry experts develop a program based on your specific business needs. We then implement your training program through a combination of methodologies.

Contact DCSI today for a free consultation about how we can build your customized training program.

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Corporate 904.278.5383
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Training for LOS Rollout

When successful lenders prepare to invest in an LOS solution, they build DCSI into their budget for success. DCSI training specialists prepare teams for LOS rollouts every day. Working as either a supplement to your existing training staff or as a self-managed project team, DCSI makes your LOS choice exceed expectations:

- ❖ **Control Your Budget and Timeline** – Internal IT support teams are almost always stretched thin, and are specialists in their craft – not in training. DCSI training experts help transfer knowledge quickly *and* effectively, avoiding costly overruns in timeline and budget. And our flexibility means we're ready to rollout when you are – there to support your successful launch.
- ❖ **Maintain Productivity Levels** – Effective, flexible, customized training minimizes downtime and production loss during transition, and also decreases call volume to your help desk.
- ❖ **Maximize Your Investment** – Because we're familiar with most of the major LOS solutions, DCSI has the experience to help your team "ramp up" quickly, and the knowledge of the best practices that empower your staff to utilize the new system to its fullest potential.

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Mortgage Services Training

Financial institutions call on DCSI for training assistance in every core process, and we have designed programs for a broad range of needs. Below are a few of our most frequently requested services:

Training for Loan Servicing Systems
Loan Processor Training
Customer Service Training

Loan Officer Training
Closing & Post-Closing Training
Supervisory & Leadership Training

❖ **Training for Loan Servicing Systems**

While the financial industry has hundreds of software solutions for loan servicing, there are few – if any – formal training programs in place for utilizing these systems to their fullest potential. DCSI's training specialists are experienced in all the leading servicing systems, and have implemented customized training programs for leading lenders nationwide. We help your team work faster and more efficiently from loan setup through collections, improving your processes and customer experience.

❖ **Loan Officer Training**

Because loan officers in any organization have varied levels of skills and experience, DCSI creates officer education tools adjusted to the specific needs of the organization and audience. We offer instructor-led training, online education tools, training workbooks and more, in combination or as individual services.

❖ **Loan Processor Training**

DCSI supports successful origination by making approval and closing of mortgage loans more efficient. Our training experts can coach your team on telephone interviewing, appropriate use of alternative documentation, use of third party vendors for credit reporting and appraisal, and even loan decisioning.

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Mortgage Services Training (cont.)

❖ **Closing & Post-Closing Training**

Mortgage professionals who close mortgage loans must be familiar with the documents and regulations specific to that process. DCSI creates customized training, documentation and quality assurance programs to complete the process swiftly and accurately. Likewise, preparation of loans for secondary market by closers demands a regimented attention to detail, executed consistently and quickly. DCSI trains teams to execute post-closing process quickly and diligently, reducing backtracking for errors and facilitating easy sales to secondary market.

❖ **Customer Service Training**

The success of a financial services company depends in great part on its ability to provide excellent customer service. A strong commitment to customer service promotes retention, cross-selling and repeat business. In addition to the customized training on internal operations, DCSI also offers ongoing education for effective communication, strategies for anticipating the needs of customers and best practices for call centers.

❖ **Supervisory & Leadership Training**

As a provider of human resources services, DCSI is keenly aware of the need for informed and well-prepared company leadership. As a result, we have developed an extensive library of leadership training courses.

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How DCSI Delivers

After a comprehensive review of your business situation DCSI prepares a customized training program to address your specific needs, based on multiple training methodologies:

Instructional Design

Floor Support

Online Reference Manuals

On-Site Training (Facilitation)

e-Learning

Technical Writing & Business Process Documentation

Instructional Design

Trained to use the latest techniques to engage and educate corporate adult learners, DCSI instructional designers also have an average of five years experience specifically in the mortgage industry. Additionally, these specialists must pass stringent certification requirements before becoming a part of our national network.

Financial institutions use our instructional design services to help:

- Analyze the environment, resources and objectives
- Design a solution and methods of execution
- Develop learning and documentation materials
- Create a plan for implementation
- Evaluate and measure results so that, if needed, adjustments can be made

On-Site Training (Facilitation)

DCSI can work directly on site, conducting instructor-led courses and train-the-trainer programs. All educational material and instruction is based on your specific business needs and processes.

Floor Support

DCSI realizes that individuals respond differently to different types of learning, so we also offer floor support as a supplement to our other training methods. During the initial launch of your software, DCSI can support your team with “hands-on” guidance as they make on-the-job application of the techniques and skills they have learned.

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How DCSI Delivers (cont.)

e-Learning Online Reference Manuals

DCSI develops customized online reference manuals and e-Learning options that address your training needs, serve as user guides and promote continuing education. Should you have unique requirements for alternative delivery methods DCSI can make recommendations and suggest alternatives.

Technical Writing & Business Process Documentation

Often after enlisting DCSI training services our clients realize the true value of quality reference materials and process documents. To be effective these tools should be developed by professionals skilled in technical writing and documentation. DCSI professionals are not only highly qualified writers and process analysts, they are specialists familiar with the mortgage industry.

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Success Stories

DCSI responds to the specific needs of our clients – turning challenges into success stories. Below are some highlights of our most recent projects.

Story 1: Promote Consistent Training on National Level

Upgrades to loan servicing software created an urgent need for additional training staff at this nationally recognized mortgage lender and servicer. Dynamic Corporate Solutions provided seven mortgage lending professionals with training experience and expertise to participate in a 3-day "Train the Trainer" session in preparation for delivery of software training to loan servicing personnel in three national servicing centers. As the immediate training need was addressed, the client retained DCSI for an additional year to facilitate ongoing loan servicing procedure and system training. Nine DCSI facilitators assisted the client company training professionals in addressing the education and performance needs of loan administration personnel in Milwaukee, Northridge, Chicago and Jacksonville.

Story 2: Support Rapid Growth in Staff Numbers

To help this Fortune 100 financial institution support the increasing number of residential mortgage loan processing, closing and administrative personnel, DCSI facilitators delivered software, process and mortgage lending basics to newly hired bank employees. Since 2002, DCSI has continued as a partner with the institution to provide the bank Consumer Products Training and Development group with assets needed to support the rapid growth required by the interest rate environment.

Story 3: Create Training for New Proprietary Software

In 2001, this nationally recognized bank initiated a strategy to grow their share of the mortgage lending market. An integral part of that strategy was the development and implementation of a new proprietary loan origination software. Nine DCSI technical facilitators teamed with the bank's facilitators to introduce the new software and lending process to branch sales representatives in all the client's markets. Since the introduction of the software, the company has secured its position as the top mortgage lender in the United States.

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Success Stories (cont.)

Story 4: Increase Sales with Ongoing Education

As interest rates began to climb and the number of refinance applications began to slow, a large regional mortgage company recognized a need to remind loan originators of the keys to successful loan production. Dynamic Corporate Solutions used a multimillion dollar mortgage loan executive to assist in the development and facilitation of a one-day training course on successful mortgage lending sales. The training increased the ability and effectiveness of the residential mortgage lending originators so that the impact of rising interest rates and subsequent fall out of refinance applications was significantly reduced.

Story 5: Re-engineer Processes Post Merger

As a result of extensive merger and acquisition activity, a nationally recognized mortgage lender and servicer needed to redesign all aspects of its loan servicing training. DCSI assigned more than 20 Instructional Design specialists to assist the company led teams to update and develop materials for Escrow Administration, Customer Care, Bank Reconciliation, Cash Management and other loan administration support topics. Development of materials required extensive meetings and relationship building with the client's subject matter experts. Initial deliverables required the development and distribution of job aids and scripted on-the-job training in order to migrate employees to new and unfamiliar job tasks. Later project deliverables included detailed instructor guides and participant materials for facilitator-led training lasting two days to three weeks as required by the course content.

Story 6: Create Customer Service Training Materials for Loan Servicing

In order to educate newly hired loan servicing personnel, DCSI was contracted to develop materials regarding the effective use of MSP and Director to respond effectively to customer inquiries. Working in conjunction with client training department employees, the DCSI consultant directed the creation of a 4-day class. Development of the materials for this 7-hour facilitator led course required extensive mortgage servicing experience, as well as knowledge of the MSP and Director systems.

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Success Stories (cont.)

Story 7: Customize New-Hire Training for Specific Business Objectives

This self-study course was created for line managers who needed a cost effective way to educate newly recruited staff. The course provided basic information on the mortgage lending process and included numerous opportunities for the learner to test his/her understanding of the concepts presented. The course was customized to the practices and policies of the client and was so well received; it was also used to orient experienced mortgage lenders to this large regional mortgage company's operation.

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