



VALUEMOMENTUM

Deliver Value Drive Momentum™



## ValueMomentum Case Study

### Web based Product Configuration and Pricing Engine (PPE)

for a Leading Mortgage Bank.

#### Results

- Workbench significantly reduced time to market new products and changes to products
- Channel Partners are poised to capitalize quickly on market opportunities
- Solution provided a mechanism to increase effectiveness and measure of marketing efforts

#### Business Situation

- Loan officers recommended products based on their implicit biases and knowledge rather than best-fit recommendations.
- Automation support was needed for delivering to nearly 10 Business Channels and information maintenance on over 500 products.
- This Mortgage Bank aimed to reduce sales errors and improve profitability and conversion rates.

#### Challenge

- Brokers, Loan officers, Product Managers and Channel Partners were expected to be provided with a web based Product management, Product Configuration, Pricing, Quoting and Locking platform (in short PPE)
- Brokers and Loan officers would use the web-based PPE for entering Customer information in a series of steps, access information about the Customer such as Credit reports, analyze the Customer needs and what he/she is eligible for, configure the appropriate product and price it with options

#### Solution

- ValueMomentum deployed a Product and Pricing Engine (PPE). The PPE workbench environment included a navigation tool for easy navigation and search of specific products and related guidelines.
- Performed all life cycle steps right from Inception to Elaboration to Construction and Transition.
- Channel managers and Channel Partners are poised to capitalize quickly on market opportunities, while providing a mechanism to increase effectiveness and measure of marketing efforts

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## About ValueMomentum

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ValueMomentum provides Software & Services to Insurance, Healthcare & Financial Services firms.

Our Software is offered as part of our Foundry family of products that addresses Product Configuration, Rating, Underwriting and Agent Portal. Our Services offerings include Application Development & Systems Integration, Enterprise Content Management, Quality Assurance & Testing, Information Management & Business Intelligence and Customer Relationship Management.

Contact ValueMomentum today by writing us at [solutions@valuemomentum.com](mailto:solutions@valuemomentum.com) or visit [www.valuemomentum.com](http://www.valuemomentum.com).

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## Industry Recognition

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Recognized by Tech Decisions & Novarica as Winner of 2012 RAVE Award based on high scores achieved in Novarica's Average Customer Experience (ACE) Rankings and in an Insurance Networking News and Financial Insights (an IDC Company) survey as "Up & Coming" and "Adds Best Value".

Ranked 24th in Deloitte Technology Fast 50 India, 225th in Fast 500 APAC.; Information Week EDGE Award for "Product Design & Rating"



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