



CG's testing expertise keeps mortgage processing system conversion on track to deliver \$23 million in savings

A potential roadblock to success

Challenge: Lack of in-house testing capabilities threatened high-stakes conversion effort.

CG's client — a Top 4 U.S. Bank — planned to convert its vendor-based mortgage processing system to the proprietary one used by the large mortgage lending company it had recently acquired. Converting systems offered numerous advantages, including better knowledge management, more robust processing capabilities and a lower cost-per-transaction rate. But the client soon realized it lacked the testing expertise and resources that the conversion project required. Failure or delay on the testing front could prove costly: hundreds of thousands of dollars in vendor software fees; additional man-hours; damaging system errors; compromised customer experiences; and even lost market share.

Clearing a path to completion

Solution: CG brought knowledge, speed and experience.

The client turned to longstanding partner, CG, to solve its testing dilemma. CG knew the client's business and mortgage processing system inside and out and was already spearheading the conversion project. Plus, it had the testing experience and program management skills required to quickly and successfully oversee this demanding component of the project.

CG developed an end-to-end strategy that established objectives for each testing phase, standardized reporting and communications for the large, geographically dispersed team and then managed and monitored the entire process.

Test grade: A+

Result: CG's testing solution ensured a fast and seamless transition to the new mortgage processing system.



\$23M

*in savings from
conversion effort
and successful
testing*



70

*applications tested
and*

2,000

*defects identified
and resolved in*

30

days



3.2M

*customers
successfully
and seamlessly
converted*



About CG's Lending Practice

CG's Lending Practice is powered by 400 professionals with an average tenure of 15 years in the financial services industry. What makes our consultants unique is their depth of lending experience and their track records as operators and technologists who understand and have lived through your challenges. This distinct combination assures best practices for your business, provides outstanding service to your customers, helps you gain efficiencies and reduces your organizational and project risk.

TOP 4 U.S. BANK

"CG has deep knowledge of our organizations, its issues and its people.

CG is familiar with start-up times and learning curves, and they build networks with people very quickly."

Carlisle & Gallagher Consulting Group, Inc. (CG) is the business and technology consulting firm that **7 of the 10 largest financial institutions in North America** count on to help them solve their greatest challenges. We've earned the trust and ongoing partnership of these industry leaders because of our exclusive focus on the financial services industry, the unparalleled experience of our people, the exceptional customer experience we provide and the definitive, repeatable results we consistently deliver. As an NTT DATA company, CG brings the added benefits of broad technology depth, cross-industry innovation and global reach from NTT DATA's position as a leading IT services provider and global innovation partner with 76,000 professionals based in over 40 countries.

Let's Get Started

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