



---

IMPLEMENTATION BEST PRACTICES

To assist you with the implementation and adoption of LoanBeam, we've put together this short list of basic and advanced best practices. The *Basic* best practices require relatively low commitment, while the *Advanced* require greater commitment. Instituting these policies will improve the likelihood that:

- Users understand what they are being asked to perform.
- Roll out will proceed smoothly.
- The software will receive wide adoption.
- You will attain the financial and operational benefits of implementing LoanBeam.

## Basic



### Start at the top

Leadership needs to “buy in” to the software across all lines of business.



### Provide clear expectations

Instituting policies and procedures around new software takes the guesswork out of implementation. A mandatory adoption policy is preferable, but even an “optional use” policy can offer strong guardrails around expectations.

- [Policy example for Dashboard Users](#)
- [Policy example for Encompass Users](#)



### Find a leader

Assign a person to oversee the project implementation that has a vested interest in seeing it succeed. For example, an operations manager has far more to gain by successfully implementing LoanBeam than a randomly chosen project manager. (Interested in learning more about what makes an effective project manager? Here is a [great article](#).)



### Work from a plan

Working from a central project plan will allow your implementation team to establish clear deadlines and define responsibilities. (If you are interested in learning more about project planning, check out this [resource](#).)



### Communicate effectively

Users are inundated with emails in today's corporate environment. As a result, emails are often overlooked or ignored. For successful LoanBeam implementation, repetitive communications with concise messaging is critically important.

- [Communication example for Dashboard Users](#)
- [Communication example for Encompass Users](#)

## Basic (Continued)



### Use LoanBeam at the beginning of your process flow

LoanBeam's OCR and calculation technology is designed to reduce turn times by eliminating manual entry. By implementing LoanBeam at the earliest points of your process flow — for example, with the sales rep or in your point-of-sale system — your time savings is compounded.



### Train your users

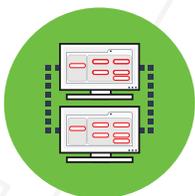
Our usage statistics indicate that users who attend LoanBeam training are more than 30% more likely to use LoanBeam, and have lower resubmission rates (i.e., fewer errors). To attend one of our live webinars, visit our [training home page](#).



### Reward adoption

Gifts, notes, letters, or other forms of recognition are great ways to reinforce usage with those who are adopting new technology — and motivate those who aren't.

## Advanced



### Integrate LoanBeam into your POS or LOS system

Users are more likely to use software embedded in systems they already use. LoanBeam's APIs and webhooks make it easy to integrate into Encompass, Empower, Mortgage Cadence, or other loan origination or point of sale systems.



### Automate the use of LoanBeam

Using software to decide which applications should be analyzed by LoanBeam removes human decision-making from the process. This ensures that all relevant applications are pushed to LoanBeam for processing. As an example, design your POS system to submit a LoanBeam application if tax returns are required for the file.



### Endorse LoanBeam's output

At initial adoption, employees may be wary of LoanBeam's OCR and calculation accuracy, and may be hesitant to use the technology. Adopting a policy — even a temporary one — that provides assurances to your employees that LoanBeam's OCR and calculations can be relied upon can temper unfounded concerns and promote rapid adoption.