



Encompass Persona Based Workflow Review

Maintaining training documentation is a must to keep your team up to date and running efficiently. Encompass® Persona Based Workflows break the lending process down into manageable stages, provide milestones along the way, and identify tasks that need to be completed.

Products and services

Persona Based Workflows clearly document and define role-based job duties and best practices for Encompass users unique to your organization. This documentation serves as a reference point for employees that outlines clear expectations for each role, increases confidence, and sets them up for greater success.

Keep employees operating at full potential

Persona Based Workflow review will:

- Maintain current Encompass training documentation
- Examine documentation against your system environment
- Provide revised documentation in a tracked changes format for review and approval
- Provide new and fully formatted Persona Based Workflows

Service delivery

- Process consultation and review with a subject matter expert for each persona
- Review and update of training documentation twice annually

Encompass Persona Based Workflow Maintenance Subscription

As an optional add-on service, we will provide a high-touch engagement focused on documentation review that outlines end user tasks and activities that have changed or been added with the latest Encompass release.

Varying solution levels are available to fit your needs:

- Basic: Review and update once annually.
- Premier: Review and update twice annually.
- Elite: Review and update up to four times annually.

Benefits

- Accurate and clearly defined, role-based job duties
 - Greater workflow efficiency
 - Finalized documentation ready for dissemination
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Connect with an expert at: 1-888-955-9100 or sales-mortgagetech@ice.com