

## STRATMOR Group Speakers Bureau

### TOPICS & SPEAKERS

#### Schedule a STRATMOR Expert to speak at your event

The STRATMOR Speakers Bureau is a team of industry experts who can speak at your most important company or association events and conferences. You can benefit from our consultants' experience and STRATMOR's industry-leading benchmarking data.

STRATMOR can deliver data-driven insights on a wide range of topics and our experienced speakers tap into the industry's most comprehensive benchmarking data to share insights that are informative and enlightening. The following chart lists just a sampling of the variety of topics the Speakers Bureau has to offer.

AREA OF INTEREST	POSSIBLE CONTENT FROM WHICH TO BUILD A SPEAKING ENGAGEMENT	SPEAKER
<b>EXECUTIVE</b>	<b>Benchmarking and Performance Measurement</b> The importance of understanding your company's performance versus peers. When is a performance gap a problem? How to assure that you're comparing apples to apples? Operating model differences and their impact on performance. When are gaps simply a reflection of scale or geography?	<b>Jim Cameron</b> <b>Nicole Young</b>
	<b>M&amp;A Market Trends</b> Who are the buyers? Who are the sellers? What are their motivations? What are the supply/demand dynamics in the M&A marketplace? At what values and under what structures are deals getting done?	<b>Jim Cameron</b> <b>Jeff Babcock</b>
	<b>Mortgage Industry Trends and Key Drivers</b> Industry growth and margin trends; macro-economic trends and impacts; demographic trends and impact; market share outlook by channel and lender type; key success factors; likely winners and losers.	<b>Jim Cameron</b>
	<b>When to Sell Your Company?</b> Planning and adopting an exit strategy. What are your objectives: for your financial expectations; for your employees; for your legacy? When in the mortgage industry business cycle does selling make the most sense?	<b>Jeff Babcock</b> <b>Jim Cameron</b>
	<b>What's Your Company Worth?</b> How is value determined and what are the key drivers of value? What are the typical deal structures? How do supply/demand dynamics affect price? What are some of the best strategies for increasing shareholder value?	<b>Jeff Babcock</b> <b>Jim Cameron</b>

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<b>EXECUTIVE</b>	<p><b>Making an M&amp;A Transaction Work</b> Finding the right partner; assuring cultural alignment; determining the model match; thoughtful integration of people, processes and systems; strategies for maximizing sales-force retention; aligning buyer/seller interests; retaining key executives.</p>	<p><b>Jim Cameron</b> <b>Jeff Babcock</b></p>
	<p><b>Organizing Bank Mortgage Operations for High Performance</b> Relationship between the mortgage banking unit and bank units in sales, back office functions and corporate administrative function. Interaction with bank portfolio lending goals. Consumer direct, accounting methodologies, compensation. Product and service lead generation between bank and mortgage units.</p>	<p><b>Tom Finnegan</b></p>
	<p><b>Winning in a Slow Growth Environment: Stealing Share</b> With long-term industry growth expected to be much lower than in the past, strategies for "stealing share" will be a key component of a lender's growth strategy. What might these strategies be?</p>	<p><b>Matt Lind</b> <b>Garth Graham</b></p>
	<p><b>What's the Future for Retail Loan Originators?</b> As the percentage of self-generated leads by retail LOs continues to decline, what does this suggest about the future role and compensation of Retail LOs? Will the Retail LO sales forces look more and more like a non-centralized Consumer Direct sales operation spread across geographically dispersed branches?</p>	<p><b>Garth Graham</b> <b>Jim Cameron</b> <b>Matt Lind</b></p>
	<p><b>How a CEO Can Know if the Company's IT Team is Effective?</b> What are the earmarks of a responsive and focused IT support organization and effective IT leadership? What are the practical things a CEO can do to ensure that the IT team is in tune with the business?</p>	<p><b>Len Tichy</b></p>
	<p><b>What's Keeping CEOs Awake at Night?</b> A review of the current issues and developments that are causing insomnia in the corner office.</p>	<p><b>Rob Chrisman</b></p>



AREA OF INTEREST	POSSIBLE CONTENT FROM WHICH TO BUILD A SPEAKING ENGAGEMENT	SPEAKER
<b>TECHNOLOGY &amp; OPERATIONS</b>	<b>Buying the Right LOS and implementing it Right</b> An industry perspective on how LOS procurement and implementation has changed over the last 10 years. What's the state of the LOS vendor landscape? What are the attributes of a lender who is ready to take on the high-risk challenges of LOS implementation? How does our Tech Insights Survey Data support our assertions?	<b>Len Tichy</b>
	<b>How a CEO Can Know if the Company's IT Team is Effective?</b> What are the earmarks of a responsive and focused IT support organization and effective IT leadership? What are the practical things a CEO can do to ensure that the IT team is in tune with the business?	<b>Len Tichy</b>
	<b>Managing Millennials in the New Workforce</b> Viewed as employees, how do the attitudes, values and job expectations of Millennials differ from other workforce age segments? What does this suggest for the strategies and tactics for recruiting, motivating and retaining millennial employees?	<b>Garth Graham</b>
<b>HUMAN RESOURCES</b>	<b>Managing and Motivating an Intergenerational Workforce -</b> What are the differences in attitude, motivation, work styles, etc. across different generations. What does this mean for how you motivate and reward different generations of workers? Creating transparency and cooperative behavior across generations.	<b>Lisa Springer</b>
	<b>Attracting the Younger Generation to Mortgage Banking</b> How does the younger generation view the mortgage industry? Given the negative view of the industry held by younger people, how can lenders change these perceptions? Communicating the scope and breadth of opportunities within the mortgage industry. Ways to attract and recruit younger people to the industry.	<b>Lisa Springer</b>
	<b>Trends in Production Compensation</b> Overall compensation trends in sales, fulfillment and post-closing operations. Compensation plan structures - base vs. variable compensation by position. What's the makeup of variable compensation, e.g., volume and non-volume based incentives?	<b>Nicole Young</b>
	<b>Managing Millennials in the New Workforce -</b> Viewed as employees, how do the attitudes, values and job expectations of Millennials differ from other workforce age segments? What does this suggest for the strategies and tactics for recruiting, motivating and retaining millennial employees?	<b>Garth Graham</b>



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<b>MARKETING &amp; SALES</b>	<b>Marketing to Millennials</b> Strategies and tactics for marketing to millennial homebuyers. Learn from consumer research from over 150,000 borrower surveys about what drives their purchase and borrowing behavior.	<b>Garth Graham</b>
	<b>Sales and Marketing Effectiveness</b> What are sales and marketing effectiveness? How do you measure them? What strategies and tactics have proven successful in improving them?	<b>Garth Graham</b>
	<b>Purchase Market Sales and Marketing</b> When purchase markets heat up, do your sales people go into a slump? Whether you have retail or call center loan originators, you need to offer them training focused on how to originate purchasers. Get insights from more than 150,000 consumers surveyed, and learn what drives the purchase borrower and the critical role of the Realtor.	<b>Garth Graham</b>
	<b>Marketing to First-Time Homebuyers</b> Learn from consumer research from over 150,000 borrower surveys about what drives the FTHB purchase and borrowing behavior. What are the primary items preventing home ownership and what can you do as a lender to be more successful?	<b>Garth Graham</b>
	<b>The Digital Mortgage</b> Today, the term “Digital Mortgage” has evolved to mean much more than just improving or digitizing point-of-sale and fulfillment functions. This evolution is being fueled by overall technology trends, including the growth of smart phones, high-speed internet and big data, which are creating new ways for borrowers and lenders to interact at virtually all points of the mortgage loan life cycle. This interaction includes functions both upstream of taking an application (lead generation) and downstream of closing (loan servicing and retention). Learn about the current trend towards the digital mortgage, and how lenders need to create a roadmap to the future.	<b>Garth Graham</b>
	<b>Customer Satisfaction Trends and Measurement</b> Measuring borrower satisfaction is one of the most critical ways to understand the impact of the loan process. Get insights from more than 150,000 borrower surveys, including critical factors that drive satisfaction, and the seven deadly sins that drive down satisfaction.	<b>Garth Graham</b>
	<b>The CRA and Fair Lending Challenge: Maximizing Your Low and Moderate Income Lending Opportunities</b> Understanding your markets vis-à-vis CRA and Fair Lending requirements; product design, down-payment assistance opportunities; role of data analysis and marketing; LO compensation/motivation for CRA loans; role of CRA loan purchases.	<b>Tom Finnegan</b>



AREA OF INTEREST	POSSIBLE CONTENT FROM WHICH TO BUILD A SPEAKING ENGAGEMENT	SPEAKER
<b>MARKETING &amp; SALES</b>	<b>Developing Effective Mortgage Technology Products</b> Vendors need to better understand lender problems and what they are attempting to solve with their technology solution. What are the gaps in current functionality? What is the implementation strategy? What support needs to be offered to the lender? How do you assure that your product roadmap is aligned with the future directions of the industry? Creating transparency and avoiding hype in the sales process.	<b>Lisa Springer</b>
	<b>Understanding Your Sales Force</b> How does retail LO productivity and attrition vary with age, tenure, gender, ethnicity and production mix? Does LO productivity vary depending on the lender’s operating model, the type of lender, e.g., Bank vs. Independent, and lender size?	<b>Nicole Young</b>
	<b>Trends in Production Compensation</b> Overall compensation trends in sales, fulfillment and post-closing operations. Compensation plan structures – base vs. variable compensation by position. What’s the makeup of variable compensation, e.g., volume and non-volume based incentives?	<b>Nicole Young</b>
<b>SERVICING</b>	<b>Subservicing Oversight</b> The use of a sub-servicer often seems like an easy way for originators to take advantage of the economic benefits of retaining servicing. However, recent regulatory changes have raised the stakes on the oversight of such a critical vendor. The CFPB and other regulators have a playbook, so each lender needs one as well.	<b>Michael Grad</b>
<b>FINANCE &amp; ADMINISTRATION</b>	<b>Measuring Mortgage Banking Performance Inside Your Bank</b> Understanding the critical elements in performance. Origination and servicing economics. P&L structures; accounting for portfolio lending inside units; cost and revenue allocation between mortgage and bank units. Benchmarking performance against bank and non-bank peers. Measuring borrower satisfaction.	<b>Tom Finnegan</b>
	<b>What Are the Key Factors Affecting Performance?</b> What are the key metrics for sales, production operations and loan servicing? How have they changed over time? What are the main drivers affecting the key metrics? What are the main sources of data for calculating key metrics?	<b>Nicole Young</b>



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<b>SECONDARY MARKETING &amp; CAPITAL MARKETS</b>	<b>When “Best Efforts” is Not Enough</b> Capital markets personnel have a variety of pricing, investor, execution methods available to them. What are the differences? Who are the top investors and what are their strengths and weaknesses? What are the pros and cons of retaining servicing?	<b>Rob Chrisman</b>
	<b>Evaluating Your Secondary Marketing Team</b> The world is filled with ways of measuring things – including secondary marketing performance and personnel. Where does one even begin to evaluate the strengths and weaknesses of personnel? What is more important, cultural fit or market knowledge? And what should a manager do after evaluating their personnel?	<b>Rob Chrisman</b>
	<b>Building a Strong Secondary Marketing Team</b> Does it make more sense to train someone, and pay less up front, or hire an experienced person and pay up? Besides on-the-job training, what are good ways to increase the staff’s knowledge?	<b>Rob Chrisman</b>

## CONTACT US TODAY

If you have a question or a specific need for your event, please contact us today. We work closely with you to create content that meets your specific needs and there is no better team in the industry for informing and enlivening your event or conference.

**STRATMOR GROUP**  
Call 303.486.6823 or email: [info@stratmorgroup.com](mailto:info@stratmorgroup.com).