

W.J. Bradley Mortgage Company Uses Key Survey to Solve Problems, Track Metrics, and Provide Superior Customer Service

W.J. Bradley Mortgage Capital Corporation:

A leader in home loan lending

W.J. Bradley Mortgage Capital Corporation is a privately held independent mortgage lending firm, founded in 2003.

As one of the leading independent mortgage retail bankers in the United States, the company offers a variety of mortgage products to customers all over the country.

Key Survey Addresses the Diverse Needs and Challenges of a Company Devoted to Professional Excellence and Outstanding Service

As a company with a mission to become the top independent retail mortgage originator in the nation while simultaneously upgrading service levels in the mortgage industry, W. J. Bradley needs a powerful, flexible, sophisticated survey tool. From the very beginning Key Survey has been its first choice for a wide range of applications.

“We have used Key Survey for many years,” Kimberly Collins says. Collins is Senior Vice President, Customer Experience for W.J. Bradley, and has deployed Key Survey for a variety of reasons including, for example, employee surveys, blind surveys, customer feedback surveys, metric tracking, and post-training session evaluations.

“One reason that Key Survey works so well for us is that the survey tool and resources allow for doing complex kinds of information gathering and robust analytics and reporting. But the more that I use Key Survey the more the experience just keeps getting better and we keep realizing more and more ways to use Key Survey for different purposes and objectives.”

The company uses surveys, for instance, to help it know its market and grow its market share by responding to the constantly changing demands of the marketplace. Similarly, it uses Key Survey data to gain valuable insight into its internal operations and to gauge the performance and satisfaction of its personnel. Meanwhile W. J. Bradley keeps a healthy dialog going with its customers to better understand their ongoing experience, even after mortgages have been funded, as the company strives to build sustainable long-term relationships.



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Internal Usage of Key Survey Application

W.J. Bradley also finds Key Survey invaluable for addressing internal issues to arrive at fast, affordable solutions. The company uses a specifically designed Key Survey on a routine basis, for example, in order to affordably and effectively conduct its important quarterly survey of company employees.

The organization typically sends out the survey to about 200 different participants at a time and gets the results almost immediately. The software is simple to use, so W.J. Bradley can harvest the results, analyze them across a number of different metrics, and deliver final reports in whatever kinds of formats it needs – accomplishing everything without the necessity for any special training or survey technology expertise.

“Using Key Survey each quarter in this way lets us accurately measure where we stand,” Collins says, “and then we can decide what measures or procedures to implement in order to give our employees the appropriate resources they need. It has a very positive impact on the way our sales team works, for example, because it provides a convenient way to get information and feedback from the sales people and share it with people who are elsewhere in the company – like those who plan our marketing and advertising.”

Improved Communication and Responsive through Key Survey

Because they are able to do it fast and in a clear, unambiguous manner it helps to save time and money. There are fewer opportunities for critical messages or data to become lost in translation or delayed along the way as they move through channels to reach the right person who needs that information. But what may be even more valuable is that it allows the company to be highly responsive to customers in an industry that has seen some historically volatile cycles and dramatic restructuring within recent years.

“We always know that performing a survey will give us a greater and more realistic understanding of each part of the company,” says Collins. “We find out about such things as how departments

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are meeting their goals and hitting benchmarks and metrics.”

So if someone has a great idea in one part of the company, for instance, a strategically designed survey will bring the idea forward where it can be put to good use. Perhaps the same innovative process or clever solution can be applied in other departments or across the whole organizational grid.

“You just never know what might come out of one of these surveys,” Collins acknowledges. “That makes them really valuable.”

She says that sometimes the information that is gleaned from a survey is not at all what she expected, for example, and can deliver pleasant surprises in terms of getting to the root of a problem and solving it.

“One time, for instance, we found out that there was a climate control issue in some of our offices,” she recalls. “People were uncomfortable because the temperature settings weren’t right, so they were feeling too warm or too cold.” Something as simple as that can really have a negative impact on performance, workplace satisfaction, and general morale, as Collins learned from the experience.

“It may not seem like a big deal,” Collins says, “but it was really upsetting to people – and for good reason. How can you focus on work when you are uncomfortable just sitting at your desk? Thanks to the feedback and employee comments we got from doing the Key Survey, though, we were able to send a contractor out to the locations that had a problem and take care of the situation right away. You cannot imagine how much employees really appreciated that kind of proactive response.”

Key Survey to Improve Customer Service and Strengthen the W.J. Bradley Reputation and Brand

“But of course we also use lots of surveys in order to find out what our customers think after their loans have closed,” Collins adds.

Following up with customers who have received a loan through W.J. Bradley is an essential element of the company’s business philosophy and success, because doing so helps to ensure a great customer experience even beyond the closing of the loan.

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That makes customers more inclined to return to W.J. Bradley in the future when they have other mortgage finance needs. It also means that those past customers will likely recommend the company to others – as a byproduct of excellent customer service and attention to details like doing surveys to make sure clients are happy with their loan service.

W.J. Bradley’s Impression of WorldAPP Customer Service and Technical Support

As far as the company’s own experience with customer service as a client of WorldAPP, Collins says that W.J. Bradley is very pleased and always has been.

“They are always so good, and so professional,” she says. “I can go to them with any question and I always get answers right away. The customer support has always been really wonderful, and it just keeps getting better.”

Key Survey is a Valuable Component of W. J. Bradley’s Long Range Strategy

As a forward-thinking organization committed to helping clients obtain real estate financing tailored to their personal needs and goals, W. J. Bradley intends to continue using Key Survey.

Knowing what sales people and customers need and want means that W.J. Bradley can make more insightful and savvy decisions about its products, marketing materials, ad campaigns, pricing, and ongoing efforts to inform and educate consumers who are searching for reasonably priced and sensible mortgage finance products.

Giving employees a voice through surveys also helps to enhance the cohesive culture and morale of the company – which has branch offices and representatives in multiple locations across different states and geographical regions.

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