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## Fair Lending and Fair Servicing

### OVERVIEW



#### CHALLENGE

The client's mortgage subservicer reported an issue with its process to identify complaints and UDAAP in its customer service, call center department and needed to engage a team to perform an 18 month lookback as well as regular monthly call oversight reviews.



#### SOLUTION

Treliant established a seasoned team of professionals to perform the lookback and monthly call monitoring using state-of-the-art technology and Treliant-developed scripts to identify complaints and UDAAP.



#### APPROACH

Treliant developed test scripts for its testing platform that included numerous questions related to the quality of the call including, but not limited to, identification, caller identification, call resolution, evidence of a complaint and/or UDAAP. Treliant assisted the client with managing datasets received from the subservicer and performed quality control reviews for completed tests.

### RESULTS

- ✓ During the engagement, Treliant identified calls that could be potentially considered complaints as well as evidence of various forms of possible UDAAP.
- ✓ Treliant was able to document and report opportunities to improve agents' ability to identify potential regulatory issues including complaints and UDAAP.
- ✓ In addition to adhering to the developed test scripts, Treliant was able to identify additional opportunities for the client and its subservicer to improve its customer call handling and resolve customer concerns.