

You Spoke, We Listened Survey Insights & What's Next

Thank you to everyone who participated in our recent engagement survey. We're excited to share some highlights from the results and how they're shaping our path forward.



Key Findings

You get it.

You know why we're here. The messaging about why we chose Sageworks and the impacts has landed. We have talked about the bigger picture, and you have been listening. That part is clear, and that is a great place to start.

How We're Preparing for Your Time in Sageworks

We heard clearly that you want to understand the full loan process inside Sageworks. Knowledge builds confidence, and confidence builds success. Our training plan will be designed to give you hands on practice, test scenarios, and meaningful time in the system so you feel prepared before we go live.

Training Plans Powered by Your Feedback

Your feedback is shaping how we design training, so it feels practical and relevant

- ✓ Live, hands-on training will be provided
- ✓ Quick reference job aids will be available
- ✓ You'll have access to post-training support
- ✓ Training will be with subject matter experts to help guide you
- ✓ We'll send out communications with training updates soon
- ✓ Another Town Hall is coming with more feature demos and Q&A time
- ✓ Newsletters share module highlights & feature videos, explore them



Have a question now? Contact any member of the Project Team

Project Team

Cesar Suarez | Gregg Booth | Chris Villarreal | Jessica Adame | Gaby Garza | Laura Villarreal
Margie Rebollar | Rebecca Rodriguez | Ricki Wilson | Marie Deleon | Michael Elsik
Cassandra Jasso | Ed Bird | Ronda Johnson

Special Edition