

AI Readiness & MVP Strategy Mortgage Banking Case Study



Client Overview

- Mid-size U.S. mortgage bank
- Focus: Origination & Servicing
- Goal: Identify practical AI opportunities

Challenge

- Fragmented workflows
- Manual document processing
- High call center volume
- Unclear AI starting point

Approach

- Current state assessment
- Customer journey mapping
- Pain point prioritization
- AI ideation workshops

Key Insights

- Unstructured data bottlenecks
- Customer frustration tied to ops inefficiency
- High volume repetitive inquiries

Opportunity Areas

- Document intelligence
- Borrower self-service
- Internal knowledge copilots

MVP Solution

- AI Borrower & Agent Assistant
- Real-time loan status
- Automated Q&A
- Agent support tools

Business Impact

- Reduced call volume
- Improved customer experience
- Faster response times
- Operational efficiency

Roadmap

- 90-day pilot
- Phased rollout
- Governance framework
- Scale to additional use cases

Why 57th St Ventures

- Operator-led
- Practical AI focus
- Regulated industry expertise
- MVP-first execution