

COMMUNICATION IS KE
Escalate **PROBLEMATIC ISSUES** thro
Counsel, *not Staff*
Provide **PROPOSED SOLUTIONS**
along with Problematic Issues

intersect
servicing + foreclosure

intersect

**Breakfast & Opening
Supersession
Working Together II**

Mandalay Ballroom

Time 8:00 - 9:15AM

WORKING TOGETHER II

This session will go through the common issues that arise between servicers and attorneys and deliver solutions to ensure that everyone is getting what they need to ensure top performance and results. Some of the areas that will be covered include but are not limited to: Scorecards, chronologies, document execution and return, witness preparation, collateral files, audits, special projects as well as training.

INTERSECT | PRESENTERS



Moderator



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Speaker



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Audits

- **Annual re-certification/Due diligence and best practices**
- **Information and document exchange**
- **Onsite audit – best practices**
- **Who should participate?**
- **Handling an effective remediation**
- **Universal Audit**

Scorecards

- **Understanding metrics**
- **Effective rebuttals**
- **Watch list and remediation**

Witness Preparation

- **Trial**
- **Mediation**
- **Critical information**
- **Multiple servicers**
- **Business records**

Chronologies

- **Why they are needed**
- **When they are needed**
- **Information that is needed**
- **Proper format**

Invoicing

- **Know client guidelines/timelines**
- **Necessary format**
- **Backup information**
- **Common reasons for invoice rejection**

Curtailment/Bill Backs

- **What they are**
- **Common reason for curtailments**
- **Firm rebuttals**
- **Servicer appeals**

Onsite Training

- **Subject matter**
- **Agenda**
- **Handouts**

Working In The System

- **Understanding client systems**
- **Technical issues that normally arise**
- **Updating case information**
- **The information that is needed**
- **Processes**
- **Delays**
- **Document turnaround**

Miscellaneous

- **Escalations**
- **Matters with risk and/or reputation concerns**
- **Contested matters, TRO's and injunctions**
- **Changes in the law**



CONCLUSION – Q&A

There is much to be gained by working together as partners. The important thing is to create a smooth flow of information between servicer and law firm, which will allow for each side to perform at their best to achieve a common goal. The keys to a great partnership are:

Communication

Escalation

Understanding expectations of each side

Understanding the role of each side

Identify areas where there is room for improvement



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BREAK TIME +
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