

Checklist: Is it time to outsource?

Growth-minded credit unions continuously look for smarter ways to manage volume, control costs, and serve members faster. Strategic outsourcing can be the key to achieving all three. Use this checklist to assess your current operations and uncover opportunities to streamline workflows, strengthen performance, and scale with confidence.

- ☐ Does the cost of your overhead expenses outweigh the value of your internal lending functions?
- ☐ Does your lending team lack adequate support when someone is out of the office?
- ☐ Does your staff struggle to meet service levels when volume spikes?
- ☐ Do you need to implement artificial intelligence technology to optimize your lending processes and decisioning? If so, do you lack the funds and expertise to do so?
- ☐ Would your team be challenged to launch a new product venture to expand into a new market?
- ☐ Is standard correspondence (i.e. adverse action and welcome letters) sent manually or does it require excessive overhead to manage?
- ☐ Does it take your underwriting team more than four hours to decision a loan?
- ☐ Does your team need more time to focus on member service without being weighed down with manual tasks?
- ☐ Is the provider a credit union service organization (CUSO) that supports the credit union's service needs?
- ☐ Is recruiting and onboarding new lending operations staff costly and time consuming?



If you answered yes to any of these questions, let's talk.

Request your consultation to see how we can help you optimize your workflow and fuel growth.

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