

Axonified Employee

Lisa Iles,
Retention Agent at MCAP



“This is a casual, but effective way to build that learning and build that basis without the stress of a test.”

Lisa Iles is a Retention Agent in the Mortgage Solutions department at MCAP — a leading independent Canadian mortgage company with more than \$56 billion in mortgages under administration. We spent some time with Lisa to understand the contact center environment, the demands of her role, her knowledge requirements and, of course, her experience with Axonify. Here's what she told us:

Q: How would you describe your role?

A: I'm part of the mortgage solutions team here at MCAP, so I'm a retention agent. I help customers with mortgage refinancing, renewals, updating the mortgages themselves, and selling MCAP's home mortgage protection products. I also have a secondary role where I work as an escalation officer to ensure we meet customer expectations. In this role, I support my team by answering questions about our products and procedures.

Q: How would you describe the day-to-day demands in a contact center environment?

A: It can be very busy. Our job is to take calls and to assist clients. Sometimes there are fewer calls to take on a daily basis and sometimes there are more, but it's generally busy. We're often dealing with customers

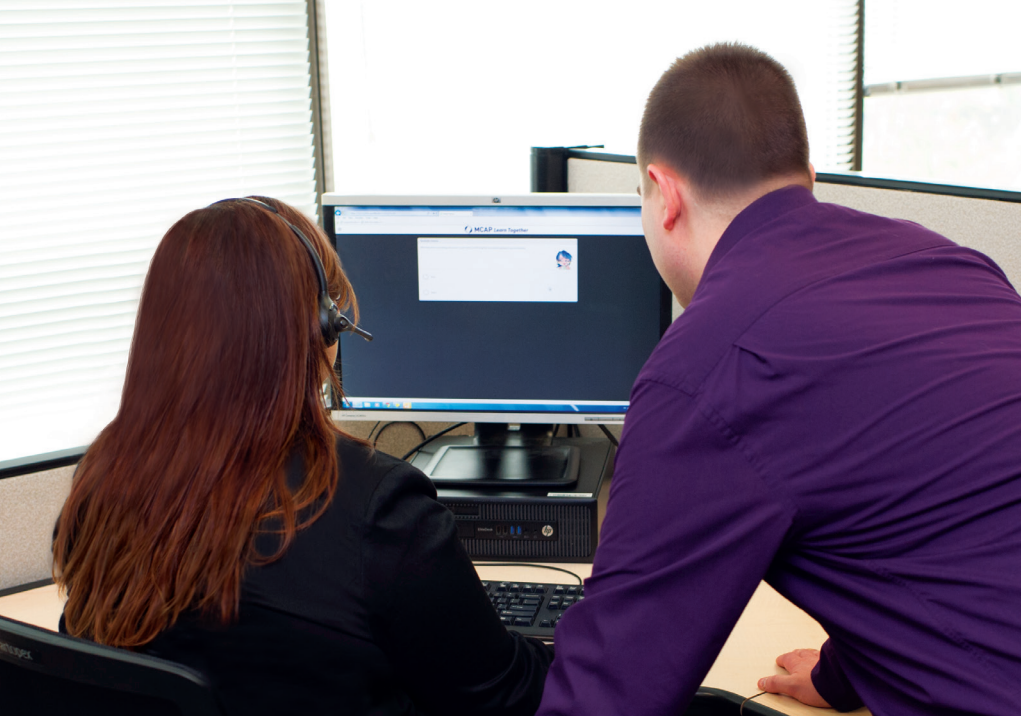
who have made one of the biggest and most important purchases of their life, so they can be anxious and even demanding at times. It's important to be able to work quickly and calmly to help them through the process. In the end, this is what makes the job so rewarding because you know you have a direct impact on the customers you interact with.

Q: What kinds of information do you need to know off the top of your head to succeed in your role?

A: You need to know product knowledge, system knowledge and what pertinent information to give a client at a particular point in time. Specific things like discharge fees, legal fees and appraisal costs are all important need-to-knows that, if you don't have to look up, can really help save you time.

Q: What types of information do you need to reference from time to time?

A: There are things, like miscellaneous fees, that you may not touch on a daily basis. Also, sometimes you can't just take over a mortgage dollar for dollar, so you need to look up information that's specific to each situation.



Q: Are there any risks of not having the right knowledge for your job?

A: If you're not proficient in the policies and procedures, and you're giving misinformation, there's a risk there. For example, if you quote the wrong rate, that could mean a loss of funds, so it can have a huge impact on the company. Providing incorrect information may also impact your performance, as we have specific metrics that monitor any errors that are committed. But, most importantly, not providing accurate information could lead to an unhappy customer, which is something we would never want!

Q: How does Axonify compare to other forms of training you have experienced?

A: Axonify gives you an opportunity to think and absorb. It's not just about getting the questions right or wrong, like on a test. You have the time to research and actually learn. You can test people on their knowledge, but if they're not

learning from what they're not getting right, then how are they actually learning? They're just knowing what they don't know.

Q: Is there a specific situation where Axonify has really helped make a difference in your performance on the job?

A: At the beginning of every year, our new annual mortgage statement comes out. You get the launch package and you read through it, but depending on the kind of learner you are, some of it may go into 'cold storage' or you may not even absorb it at all. This year, because the information was integrated into Axonify, I found that I retained the knowledge much better than in previous years and I could better assist clients and explain changes. If I hadn't used Axonify, I don't think I would have been as confident. And this is important because as soon as clients have a hint that you're unsure, you don't have their buy-in.

Q: Has Axonify had any measurable impact on your work at MCAP?

A: It definitely has. I wanted to set myself apart by being the person that you go to if you don't have the knowledge. Axonify has really helped me become proficient in our policies and procedures and, now, I've become recognized as the person to help my peers. People trust the information that they get from me. So, I am able to support my colleagues with confidence because of the knowledge-based learning that I get through Axonify.

