

**INDUSTRY:** Financial Services**COMPANY SIZE:** 500+**LOCATION:** United States

## Using Allego, AmeriSave Trains More New Hires, More Efficiently, With Dramatically Better Results

**7-9%** Increase in new hire Federal Exam pass rates

**7-9%** Improvement to average trainee's test scores



Stronger reinforcement resulting in more impactful customer interactions

Until recently, Jaclyn Smith was the star of a live television show broadcast to audiences across America. Unlike the cast of Saturday Night Live, however, Smith is not an entertainer, but the sales training manager of the Atlanta-based mortgage lender AmeriSave. Her “audience” is composed of new hires hoping to become licensed mortgage loan originators.

Before the pandemic, Jaclyn Smith was the sole trainer in charge of leading AmeriSave’s new-hire onboarding program, a five-week webinar-based program that was streamed, live, to an average of 50 to 60 employees in classrooms across the country.

When Covid-19 hit, “interest rates fell through the floor,” said Smith, “and like many other lenders, AmeriSave started to aggressively recruit and hire. I had to train new trainers that were coming on board to accommodate the fact that we were quadrupling the number of individuals coming through training, not to mention that [the new hires] would no longer be in a classroom ... but completely remote from home. I was very nervous.”

### High-Stakes Training

Although any trainer would be nervous about managing a fourfold increase in new hires, what really kept Smith up at night were the high stakes attached to training. To become a licensed mortgage loan originator, new hires must pass a 120-question federal exam (the SAFE test) with a score of 75% or better. And typically, most of AmeriSave’s new hires have little or no experience in the mortgage lending industry. This meant that most trainees had to quickly and thoroughly digest the information taught by Smith to pass the test and keep their jobs.

“Only 60% of individuals who take [the test] pass it on that first attempt. If you don’t pass the exam on the first attempt ... you have to wait 30 days before you’re eligible to take it again. Our participants are required to pass that exam to be able to continue the program. So obviously, they come here under the gun, knowing they have to pass this test in order to actually continue the program and keep their position with us.

“Not only do you have to pass the federal exam in order to become a mortgage originator ... it’s also required that you become individually licensed in each state that you’re going to be doing business in. Once they pass the test, they have to go into a database called the National Mortgage Licensing System. And when they get into that database, they have to register for each state that they’re going to be doing business in.”

## **'Allego Changed Everything'**

Before adopting the Allego Learning and Enablement Platform, Smith's trainees would log on to the live webinar, watch Smith teach the course, consult printed materials to help them digest and retain the information, and also take practice tests to help them prepare for the exam.

"Allego changed everything," said Smith. "We were able to take all of the study aids and all of the content that we had printed for them in the classroom, build all of that into prerecorded videos that trainees could watch on their own time from any device. This process was incredibly easy using Allego. We were also able to quickly build quizzes that they could take immediately after watching the videos to ensure they were able to retain what they needed to know."

Before Allego, helping each new hire learn how to become licensed in each state was a long and laborious process. "I would do live webinars with those individuals class by class – 20 over here, 20 over here, and 10 over here. I would have to do all these live webinars to show them how to use the NMLS website, how to go about doing their individual licensing. What do you need to do with your education for each step? All of that was manual."

After Allego, "we were able to pre-record short modules with everything they need to know for their licensing. After they pass the exam, all they had to do was follow the steps of everything they needed to watch."

Even after obtaining their licenses and starting work at AmeriSave, many new employees continue to watch and re-watch the training videos to reinforce what they learned during onboarding. This has helped them improve interactions with customers and empowered them to quickly master the company's technologies, systems and workflows.

**"We were able to pre-record short modules with everything they need to know for their licensing."**



**JACLYN SMITH**  
*Sales Training  
Manager*



## The Results are in the Numbers

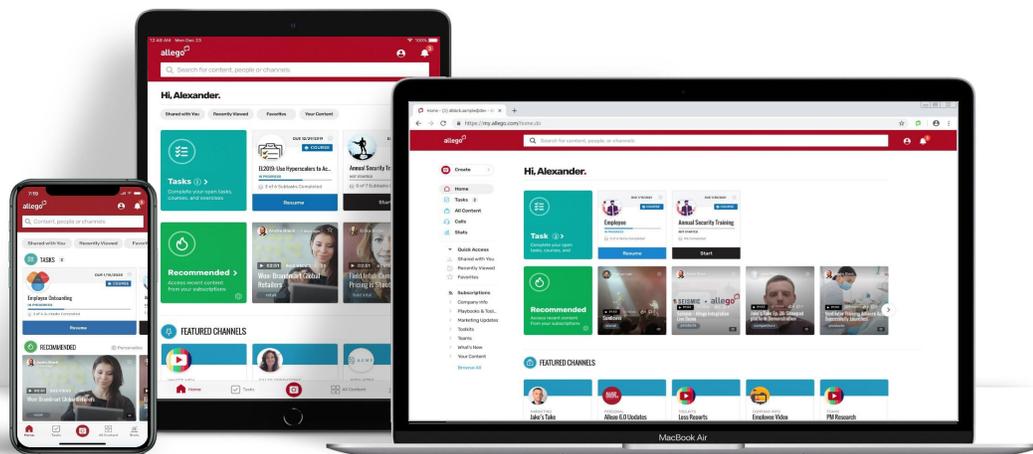
They used to say, “I’m going to live in Allego tonight. And that’s what they were doing. They would watch the live instruction. And then what they didn’t feel confident with, they had the ability to go back and rewatch that information as much as they wanted. We knew they were watching it because we could see the content views. Since we launched Allego into our IGNITE program, we’ve had over 30,000 content views. We could see these students were not only watching those videos once or twice; they were watching the videos over and over and over again to ensure that they were really retaining the information they were learning.”

Smith credits Allego with helping increase trainees’ confidence and learning-retention skills – a claim supported by the number of new hires who are passing the federal exam on the first try.

After adopting Allego, “our pass rate increased from 76%-78% to 83%-85%. Mind you, we had quadruple the number of individuals that were going through the class. Not only did our pass rates increase, but their test scores also jumped.” Prior to Allego, IGNITE Trainees averaged between 78% and 80% on the test. After launching Allego, test scores jumped to an average of 85% to 87%.

“They were studying the material autonomously without so much reliance on the instructor. We didn’t have to do so many live trainings over and over again, reviewing and repeating the information, which made it so much easier for the trainers. And these benefits were realized from the very beginning. The benefits were endless for the participant, for the trainer, and then most of all the company.

Today, AmeriSave’s participants have an organized, structured repository of all the content they need to be successful. The trainers are able to pre-record content instead of having to repeat themselves over and over again. And AmeriSave saw the benefits tenfold. The company was able to take advantage of the sudden change in market conditions by hiring enough staff to keep up with the growth in demand. The company credits Allego with empowering them to stay ahead while many competitors saw mortgage turnaround times quadruple because they didn’t have enough staff to process all the incoming applications. “And all the while we are giving a better experience to our new hires, who are starting the job with more confidence. I can’t say enough positive things about AmeriSave’s and Allego’s partnership,” Smith said.



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