



# BI Solution Positions Optimal Blue for Sustainable Success in Digital Marketplace

SysLOGIC  
CASE STUDY

**INDUSTRY** Financial Technology

**SERVICES** Information Management, Solution Architecture, Data Governance, Custom Application Development, Business Analysis, Scrum Methodology

## OPPORTUNITY

Optimal Blue is a leading provider of secondary marketing automation in the mortgage industry to thousands of originators, investors, and providers as part of the Digital Mortgage Marketplace. Optimal Blue's solutions capture a wealth of transactional data, and the company's leaders identified a unique opportunity to develop a client analytics solution that would complement and enhance the integration of their existing product portfolio. The company wanted to deliver a business intelligence product that would enable its clients to leverage both marketplace and enterprise data to improve their decision-making and stay competitive through timely and actionable intelligence. Optimal Blue needed a trusted partner that could help it navigate through the initial design and development of the new product to enhance their position in the market.

## CHALLENGES

- The project began as a pioneering, proof-of-concept engagement, and it quickly evolved into full product development. To capitalize on the limited window of opportunity, the product needed to be developed quickly.
- Optimal Blue's expertise was in delivering operational efficiencies to their clients. It needed a partner who could provide depth of knowledge in the areas of business intelligence, data governance, solution architecture, and Scrum development methodology.

## THE SOLUTION

SysLogic was selected as a partner to lead and manage the overall project and development of the analytics solution that could be leveraged nationwide by Optimal Blue's clients.

- SysLogic provided a core team with expertise in business analysis, solution architecture, business intelligence development, and Scrum process oversight.
- The teams worked remotely, with the SysLogic team in Wisconsin and the Optimal Blue team in Texas.

In addition to providing expertise in business intelligence, information management, and project leadership, SysLogic provided training and mentoring so Optimal Blue could build its internal expertise.

- Education and training on standard technologies and industry best practices, including Extract, Transform, and Load (ETL) processes and implementation, Microsoft Power BI technology, and data-intensive quality assurance testing.
- Introduced numerous information management-related approaches that expanded the Optimal Blue team's knowledge of business intelligence.
- Assisted with the growth of the Optimal Blue team. Began with educating the initial four-member team, which was later expanded to ten members.
- Provided key executives with recurring updates to ensure they could make well-informed business decisions.

SysLogic provided direction to ensure data integrity within the end product so Optimal Blue's clients would have an accurate, powerful new business intelligence product.

- Guided Optimal Blue through data profiling to better understand their data quality and risks.
- Assisted in developing data governance and data cleansing strategies to prepare the data for consumption.

“Based on the positive experience and success Optimal Blue had during the initial project, we continue to partner with SysLogic to help drive our business forward and bring additional value to our clients.”

Matt Cesarz, Vice President,  
Software Engineering, Optimal Blue

## KEY OUTCOMES

- Optimal Blue can now provide its clients with a business intelligence software product that helps them use aggregated transactional data to improve their operations, better understand product (i.e., loan) performance, and identify additional market opportunities.
- The speed to market was accelerated through the rapid product development approach, resulting in a 50% reduction in time compared to developing it entirely in-house.
- The solution contains data on 25% of all locked loans in the U.S. mortgage market, representing over \$500 billion in total loan volume.
- The product provides several key benefits to Optimal Blue clients:
  - Analyzing trends and helping with loan portfolio projections.
  - Identifying areas for operational efficiency through change request analytics.
  - Insight to help increase profitability through loan margin management and price concession analytics.
- Optimal Blue leveraged the leadership and training from SysLogic to provide a solid foundation that made it self-sufficient in supporting this product and positioning itself for future product development and support. The company has successfully broadened the product offering through numerous subsequent releases.

## CRITICAL SUCCESS FACTORS

### Support from Executive Leadership

Optimal Blue's senior leaders were involved and supported this initiative from day one. They committed the necessary resources and provided active, hands-on support. Because the executive team participated regularly in the three-week Sprint Reviews, they were well informed and could position the company for an accelerated product release.

### Integrated SysLogic and Optimal Blue Team

Ongoing communication between all parties kept the teams in sync and the project on target. A 15-minute daily standup meeting kept the project moving efficiently and helped phase in new people as the team grew and project dynamics changed. Although the two teams were working across the country, focus on collaboration and effective communication meant that being remote never slowed this project down.

### Focus on Harnessing the Power of the Data

The goal of the project was to provide Optimal Blue's clients with the ability to aggregate and utilize large amounts of transactional data. SysLogic's business intelligence expertise helped establish the right processes and oversight to ensure data integrity. Optimal Blue was able to achieve a better understanding of its data and how it could use that data to give clients more accurate intelligence.

**“ SysLogic’s collaborative partnership and technological expertise helped Optimal Blue create a high value proposition for our clients. Working with the SysLogic team rapidly accelerated our ability to bring this product to market. ”**


Matt Cesarz, Vice President,  
Software Engineering, Optimal Blue


## ABOUT optimalblue®

Optimal Blue operates the mortgage industry's Digital Marketplace, enabling buyers and sellers of loans to automate, connect, transact, and grow with a single, unified technology and value-added services platform. Optimal Blue's Digital Marketplace enables originators to automate their entire secondary marketing operation, from content through commitment, provides investors with network access and an array of compliance and business intelligence tools, and offers innovative providers API-based access to the Optimal Blue platform. Together, these originators, investors, and providers form a unique, multi-sided network touching one of every four mortgage loans closed nationally each year. [www.optimalblue.com](http://www.optimalblue.com)

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SysLogic is an information technology consulting and services firm dedicated to helping clients conduct business more effectively and efficiently. We provide deep industry expertise and deliver solutions that leverage leading-edge technology and sound business practices in the areas of business and technology strategy, enterprise applications and architecture, information management, and cybersecurity. We've been partnering with clients to extend the range, reach, and value of information technology to transform the way they do business since 1995.