LODESTAR

Implementation Plan

Thank you for partnering with LodeStar, The Fee Experts! In this document, you will find a detailed implementation plan outlining each phase of onboarding and the resources required from your team. LodeStar is doing the heavy lifting, don’t worry! But after partnering with hundreds of lenders, we have some best practices to ensure things are moving forward efficiently and smoothly!

PHASE 1: QUESTIONNAIRE

Estimated Time to Completion: 1 Week

Objective: This phase is when you will provide to LodeStar the information required for setup.

Please assign one team member to be the point of contact for all things LodeStar at your business!

This individual is usually a Project Manager or team leader from your Mortgage Operations Team and will oversee the LodeStar implementation in your LOS environment

Team Members Required: LodeStar Project Leader (see above)
LOS Admin(s)

Tasks To Complete:

- Complete the LodeStar Onboarding Questionnaire provided by your Sales Rep. It is also available in our Support Center. We need from you:
  - LOS-specific information
  - A list of providers (Title Agents, etc) you'd like to set up in our calculator
  - Loan Types and Fees you would like us to support
  - Configuration Options and Settings

- The LodeStar Project Leader should review this implementation plan and reach out with questions or concerns!

- The LodeStar Project Leader should assign 2-5 team members to be Testers (see 'Phase 3: Testing' below for more information)

Once we have a completed Onboarding Questionnaire, we will schedule a Kick Off call and move into the next phase!

Who Is Your Point of Contact At LodeStar During This Phase?

Your LodeStar Sales Representative

PHASE 2: KICK OFF CALL AND SETUP

Estimated Time to Completion: 2-4 Weeks

Objective: This phase will be your introduction to the LodeStar Customer Success team. After receiving the completed Onboarding Questionnaire, we will schedule a Kick Off Call for your team to attend.

Team Members Required: LodeStar Project Leader (see above)
LOS Admin(s)
ALL previously assigned Testers

Tasks To Complete:

- We will schedule a Kick Off call between our Implementation team and your team. The LodeStar Project Leader and ALL team members involved in the setup process, including testers, must attend this Kick Off call. We will be confirming the onboarding information provided, reviewing timelines, and answering any outstanding questions from your team.

- Any members of your team who are not familiar with our integration should watch our pre-recorded LOS demonstration before the Kick Off call.

After the Kick Off Call, LodeStar will be configuring our integration for your business. Once setup is complete, <u>we will let you know</u> and you can begin the Testing Phase.

Who Is Your Point of Contact At LodeStar During This Phase?

Your LodeStar Sales Representative

PHASE 3: TESTING

Estimated Time to Completion: 4-8 Weeks

Objective: During this phase your team will test LodeStar within your LOS and POS to resolve configuration requests and remedy any discovered issues or updates.

Team Members Required: LodeStar Project Leader
All Assigned Testers

- 2-5 members of your team should be assigned to be Testers.
- Testers should be able to advise on any issues or configuration requests within the LOS and POS by providing screenshots or documentation to the LodeStar Project Leader.
- It is recommended to have your various teams (Sales, Compliance, Operations, etc) represented during testing.
- If your business is very large or has many branches, it is recommended to include an additional 1-2 testers on the branch level who will represent the end users of our integration.

Tasks To Complete:

- Each Tester and the LodeStar Project Leader should thoroughly review the LodeStar Testing Guide and become acquainted with our Support Center. The Testing Guide describes in detail how to efficiently test LodeStar and also includes a FAQ with common questions that arise during testing.

- Testers should report any compliance errors, configuration updates, issues or requests to the LodeStar Project Leader.

- Throughout the Testing Phase, the LodeStar Project Leader should communicate all issues, updates, and requests to their LodeStar representative. Screenshots are strongly recommended.

- Once the Testing Phase begins, we will schedule a required check in call for 20 days after the start of testing. The purpose of this call is to check in on progress and address any questions or concerns from your team.

The Testing Phase will continue until you have indicated to LodeStar that you are ready to move into production. At that time, we will move into the Go-Live phase!

Who Is Your Point of Contact At LodeStar During This Phase?

Your Onboarding and Implementation Manager

PHASE 4: GO-LIVE!

Objective: After the Testing Phase is complete LodeStar will be LIVE! Before going live, we are able to provide you with two optional training calls for all of your end users.

Team Members Required: LodeStar Project Leader
All end-users of LodeStar (optional)

Tasks To Complete:

- The LodeStar Project Leader can coordinate with the LodeStar team to schedule a training call for the end users at your business. This training call will be recorded and the recording will be provided for use by your team!
- Each training call will be no greater than 30min in length. Our Customer Success team will walk through 2 example loan files showing your users how to access LodeStar, what LodeStar is, and offer a chance for Q&A at the end of the call.
- We can schedule the 2 calls on different days/times to give all of your users the opportunity to attend. These calls will be recorded and provided to you. We will provide you with additional training materials as well.
- After the training calls are complete, you will be LIVE. Please be sure to inform the users at your business that they can now use LodeStar on live loans to quote with confidence. We are so excited to partner with you!

Who Is Your Point of Contact At LodeStar During This Phase?
Your Onboarding and Implementation Manager

AFTER GO-LIVE

Once you are live our support doesn't stop there! Nothing is set in stone during onboarding and we expect our customers to have changes or updates throughout our partnership. We have outlined below a few ways to get help after you are up and running with LodeStar!

How do I get help?

- Our Support Center has lots of information, not only about how to use LodeStar within your POS and LOS, but information about state-specific fees, fee calculations, defaults, and the data we provide.

- For issues, configuration updates, or general support, please email your LodeStar representative at support@lssoftwaresolutions.com (Estimated time to resolution: 1-4 business days)

- To add a provider to your integration, please use our Title Agent Addition Form. (Estimated time to resolution: 1-3 business days after we receive the fees from the provider)

- If you'd like to inquire about adding additional LodeStar services, such as an additional POS integration, please contact your Sales representative. You can also contact our Sales team at sales@lssoftwaresolutions.com

- If you have invoice or billing questions, please email billing@lssoftwaresolutions.com

Thank you again for partnering with LodeStar! We are proud to be the only independent fee provider in the mortgage industry and we are delighted to be able to help so many lenders with their disclosures. We look forward to partnering with your company for many years to come!