



Ignite 2023 Conference & Hands-On Training | The Westin Riverwalk | May 15-18

## AGENDA

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### CONFERENCE

Monday   5/15/2023		
Time	Session	Location
3:00-5:00 PM	<b>Smart Bar - Open Hours</b> Meet with a Sagent Smarty one-on-one!	Tangent
4:00-7:00 PM	<b>Check-In for Conference</b> All customers, sponsors, and Sagent employees will check in to receive information packet, swag, and other relevant information.	Navarro Prefunction
5:30-7:00 PM	<b>Welcome Reception</b> Mix and mingle with the Sagent staff and conference attendees. Join us for cocktails, entertainment, and fun surprises!	Hidalgo

## CONFERENCE

### Tuesday AM | 5/16/2023

Time	Session	Location
8:00-8:45 AM	<b>Breakfast</b>	Hidalgo
	<b>Professional Headshots - By Appointment Only</b>	Navarro Prefunction
8:45-9:00 AM	<b>Welcome</b> Join us as we kickoff Ignite 2023 and welcome our CEO, Dan Sogorka, for our opening session.	Navarro Ballroom
9:00-10:00 AM	<b>CEO Session: Highlights from Sagent and Industry</b> Hear from Sagent CEO, Dan Sogorka, as he discusses the State of the Union at Sagent, including how we're building for the future, and what he's hearing from our industry.	Navarro Ballroom
10:00-10:15 AM	<b>Break</b>	
10:15-10:45 AM	<b>Voice of the Customer</b> Hear it directly from the source! During this session, our customers will share insights into the value and benefits Sagent products have brought them.	Navarro Ballroom
10:45-12:00 PM	<b>Sagent Compliance Overview &amp; Economic Outlook</b> Join us for this two-in-one session! First, you'll meet with our inhouse compliance team and learn more about what they are tracking. We will have a discussion of significant policy and/or regulatory changes that impact mortgage servicing and the technology that powers the industry. Then, we will switch gears and hear from one of our sponsors, SWBC, who will discuss the current conditions and outlook for the U.S. economy and housing sector, focusing on the likely depth and length of an expected slowdown in economic activity. In particular, an examination of the current and future rate environment, labor markets, and household and financial sector balance sheets as well as the contours of how mortgage activity will likely develop including loan growth, housing prices and delinquencies.	Navarro Ballroom
	<b>Breakout Session 1: LoanServ</b> <b>Daily ACH / Borrower Draft Balancing</b> Are you a new customer or perhaps one that has not reviewed ACH parameters or setup in a while? Then this session is for you! We will discuss how to balance daily ACH drafts, especially Same Day drafts. We'll also chat about the timing of drafts vs. deposits, effective dated drafting, and working rejections.	Madero
	<b>Breakout Session 2: LoanServ</b> <b>Escrow Parameters, Analysis &amp; Enhancement Reviews</b> With escrow, comes parameters, and because they can remain untouched for years (yikes!), we're going to take a deep dive into parms that are third-party/vendor-related, disbursement-related, and other general items. We'll then transition to specific best practices around escrow analysis, including report 260 overviews, history and scheduling, and setting up analysis codes. Finally, we'll touch on recent and upcoming escrow enhancements to ensure awareness within the functional area.	Villa
	<b>Breakout Session 3: TEMPO</b> <b>Order Management, Creators, and Other Guidance</b> Here we plan to "show-n-tell" our 'non-admin' users how to seamlessly order and receive fulfillment documents needed during the default process from a third-party vendor. We'll also demonstrate how these fulfillment documents can be ordered automatically from designated third-party vendors based on specific milestones in the default process.  Plus! We'll show servicer admin users how to create/edit/map specific field rules based on data fields in the loan information screens to generate work items and process flows, specifically task templates, Document Tracking templates, and Loan Alerts. We'll also show admin users how to create/edit/retire Loan Alerts based on the data in specific data fields in the loan information screens. These loan alerts would be visible to TEMPO users on specific loans. Of course, general Q&A to wrap up!	Zapata
10:45-12:00 PM	<b>Smart Bar - By Appointment Only</b> Meet with a Sagent Smarty one-on-one!	Tangent

## CONFERENCE

Tuesday PM   5/16/2023		
Time	Session	Location
12:00-2:00 PM	<b>Lunch and Partnership Spotlight</b> Enjoy your lunch while listening to demos and presentations from the various partners who have sponsored Ignite. Lunch will be served from 12:00-1:00 PM.	Hidalgo
2:00-2:30 PM	<b>Voice of the Customer</b> Hear it directly from the source! During this session, our customers will share insights into the value and benefits Sagent products have brought them.	Navarro Ballroom
2:30-3:30 PM	<b>Servicer Roundtable</b> Let's talk about the things that matter to you most! Our CSM team will lead roundtable discussions on topics such as CARE, Vendor Partnerships & Integrations, HELOC and Consumer Loans, and Default. We hope you'll listen and share with your peers to encourage increased value and benefits from your Sagent product experience.	Navarro Ballroom
	<b>Breakout Session 4: Sagent 360 Review</b> <b>General LoanServ Tips &amp; Tricks</b> Back by popular demand, an Ignite favorite! The Sagent 360 Review will discuss and review general LoanServ functionality that is already present, but overlooked or underutilized. Examples of conversation topics include Workbench/Favorites, 'Help' screens, awareness on specific screen interactions, scripted automation ideas, and more. Want to learn more about CIT setup, automation, and other ways to be more efficient? Then be sure to check this session out!	Madero
	<b>Breakout Session 5: CARE</b> <b>Features &amp; Awareness, Enterprise Review, 2.0 Transition Discussion</b> We CARE a lot (get it?!). This session will provide an overview of the CARE features and differences as we've transitioned from 1.0 to 2.0. We'll also review CARE Enterprise and provide a walkthrough on functionality and business use-case scenarios.	Villa
	<b>Breakout Session 6: LoanServ Default Focus</b> <b>Online Collection Queues, DCC, Action/Result Codes</b> Wondering if your queues are set up efficiently? See us here! We'll focus on online collection queues and discuss delinquent counselor codes (DCC) and the setup and use cases of action/result codes. To round out this session, we'll expand the discussion beyond default and review how A/R code usability can be useful in general customer service and tracking scenarios.	Zapata
2:30-3:30 PM	<b>Smart Bar - By Appointment Only</b> Meet with a Sagent Smarty one-on-one!	Tangent
3:30-4:30 PM	<b>Cocktail Hour and Visit Exhibitors</b> Explore our exhibitor area while enjoying a cocktail. It's 5 o'clock somewhere?	Navarro Prefunction
3:30-4:30 PM	<b>Smart Bar - Open Hours</b> Meet with a Sagent Smarty one-on-one!	Tangent
4:30-5:15 PM	<b>Partner Breakout Session</b> Partners this one's for you! Following our exhibit hours, we invite our fabulous sponsors who have made Ignite happen to a session with Sagent team members.	Villa
4:30-5:30 PM	<b>Break</b>	
5:30-6:00 PM	<b>Meet and Walk/Travel to Offsite Event</b>	Lobby
6:00-9:00 PM	<b>Offsite Event (optional)</b> Tonight we set work aside and party on the Riverwalk together!	Smoke Riverbar

## CONFERENCE

### Wednesday AM | 5/17/2023

Time	Session	Location
8:00-8:45 AM	<b>Breakfast</b>	Hidalgo
	<b>Professional Headshots - By Appointment Only</b>	Navarro Prefunction
8:45-9:00 AM	<b>Day 2 Kick-Off</b>	Navarro Ballroom
9:00-10:30 AM	<b>Sagent Product Roadmap</b> The future is bright at Sagent! In this session, we'll review our product roadmap and how we're advancing servicing in the years to come.	Navarro Ballroom
10:30-10:45 AM	<b>Break</b>	
10:45-12:00 PM	<b>Roadmap: A Deeper Dive</b> Let's build on our previous session and engage in a conversation together about what Sagent's Product Roadmap means for you. We'll solicit input and feedback directly from you, our customers!	Navarro Ballroom
	<b>Breakout Session 7: LoanServ</b> <b>General Ledger Best Practices, Setup, and Review</b> Here we'll cover your general ledger table setup, including best practices from the first-time perspective and annual review perspective. Conversations will aid in understanding what the daily general ledger reports represent and which to prioritize. We will also discuss how to work the daily reports and how to handle the rejects.	Madero
	<b>Breakout Session 8: LoanServ</b> <b>Field Services - Inspections and Preservation</b> When it comes to field service inspection orders and property preservation, we've got you covered! Join this session to learn about the parameters (institution and investor), best practices, and features that drive these important processes.	Villa
	<b>Breakout Session 9: LoanServ</b> <b>Bankruptcy Cash Posting Overview, Best Practices, &amp; Review Items</b> Let's get back to basics! The session will start with a foundational review of BKR cash posting parameters within LoanServ, including a discussion of BKR and Non-BKR parameters that affect BKR posting. After ensuring the system is properly set, the conversation will shift to posting basics within the BKR screens. Finally, we'll wrap up with posting exceptions and how best to handle them.	Zapata
10:45-12:00 PM	<b>Smart Bar - By Appointment Only</b> Meet with a Sagent Smarty one-on-one!	Tangent
12:00-1:00 PM	<b>Lunch/Closing of Ignite</b>	Hidalgo

## HANDS-ON TRAINING

Wednesday PM | 5/17/2023

Time	Session	Location
	<b>Lunch</b>	Hidalgo
12:00-1:00 PM	<b>Check-In for Hands-On Training</b> Customers joining us for hands-on training will check in during this time to receive valuable information.	Navarro Prefunction
	<b>Training Class: LoanServ Credit Bureau General Setup &amp; Understanding</b> As a user of LoanServ, your approach to credit bureau setup and reporting is of the utmost importance. In this session, we'll do a deep dive into parameter setup, standard processing requirements, best practices and more. The class will also review the most common reports needed and methods of triggering each report.	Camino Real
1:00-4:30 PM	<b>Training Class: TEMPO Order Mgmt Setup &amp; Doc Tracking Efficiencies</b> TEMPO is our name, and efficiency is our game! As a service admin, you'll get hands-on experience in this session to set up and customize Order Management so that you can request and receive fulfillment docs from 3rd party vendors within TEMPO. This includes how to automatically generate fulfillment doc requests from 3rd party vendors, set SLAs specific to doc type, configure multiple order timeline thresholds, auto-assign 3rd party vendors to specific doc requests, and end user access set up.  Plus! Service admins will also learn how to create new document index types and configure and set up Document Tracking. Document Tracking automatically prompts servicer or attorney users to upload certain documents via their worklist queues and can be configured to notify the servicer when the document is uploaded so it can be viewed for approval.	Sabino
4:30-5:30 PM	<b>Happy Hour</b> Unwind after a long day with some adult beverages before enjoying dinner on your own.	Olivares

## HANDS-ON TRAINING

Thursday   5/18/2023		
Time	Session	Location
8:00-9:00 AM	<b>Breakfast</b>	Lantana
9:00-11:30 AM	<b>Training Class: CARE</b> <b>Transition Training and Enterprise Walkthroughs</b> In this training, we're going to go on a journey through CARE both from the perspective of the consumer/customer and as an administrator. As a customer, you'll see what features to explore and be aware of. As an admin, we'll work through the setup and edit CARE screens, including details on what can be customized and pop-up interactions. In both cases, we'll show you the differences between CARE 1.0 and 2.0.	Camino Real
	<b>Training Class: LoanServ</b> <b>DRM Workflow, A Closer Look at Promise vs. Repay Plan</b> Let's take a walk together through the Default Risk Management commonality! We'll discuss how to establish DRM work queues, tasks, and delay reasons, and we'll identify the differences between loan level and queue workflows. We'll also highlight DR-993.020, the process driver of proper default reporting, and we'll share the differences between and benefits of Promise and Repayment plans.	Sabino
11:30-12:00 PM	<b>Break</b>	
12:00-1:00 PM	<b>Lunch</b>	Camino Real
1:00-2:30 PM	<b>Training Class: LoanServ</b> <b>Scripted Workflow – Edit and Design Application</b> In this training, we'll go beyond the basics, so please come with some knowledge of the LoanServ product! We'll be looking at scripted workflows, including best practices and recommendations for editing and modifying existing scripts, and how to read and document previously created scripts.  Additionally, we'll dive into template creation and checklist considerations for planning out scripts from a business standpoint. A discussion on the step-by-step documentation details and what to look for when designing a script will take place.	Camino Real
	<b>Training Class: LoanServ</b> <b>DRM Review - Default Expense (fees), Vendor and Estimate Setup</b> Are you using vendors in the LoanServ system? Join us as we demonstrate how users can set up new vendors, expenses (fees), and assign expenses, including estimated standard expense fees to a vendor.	Sabino
	<b>Training Class: LoanServ</b> <b>Credit Bureau General Setup &amp; Understanding (part 1 of 2)</b> This is a repeat of the Credit Bureau training offered on Wednesday. This session will begin at 1:30pm (rather than 1pm).	Goraz
2:30-2:45 PM	<b>Coffee Break</b>	In Training Rooms
2:45-4:30 PM	<b>Training Class: LoanServ</b> <b>Corporate Advances – Recoverability Item Review &amp; Setup</b> Let's Advance (not retreat) together! This class will focus on the inner workings of Corporate Advances. Specifically, we'll review the recoverability types (Borrower, Investor, 3rd Party and non-recoverable) as well as where to post any cash received, how to flip recoverability, posting of the credits, and more.	Camino Real
	<b>Training Class: LoanServ</b> <b>Escrow Parameter In-Depth Review &amp; PMI Focus</b> Raise your hand if you love Escrow! This training session will be a continuation of the Escrow breakout session held earlier during Ignite. We will walk through the "must-have" parameters and others that should be reviewed on an annual basis, and we'll focus on hazard insurance, tax payee setup, check suppression, and other parms specific to PMI. Our remaining focus will be on PMI, especially reporting. This will review the most important PMI general reports, exception reports, and initial premiums due at payoff.	Sabino
	<b>Training Class: LoanServ</b> <b>Credit Bureau General Setup &amp; Understanding (part 2 of 2)</b> This is a continuation of the Credit Bureau training from the previous session.	Goraz
4:30-5:30 PM	<b>Break</b>	
5:30-8:30 PM	<b>Offsite Event (optional)</b> Join us for a cocktail cruise on the river, followed by dinner at a local favorite spot.	Ocho Hotel Havana