

Buyer Journey Map: Mortgage QC Copilot (AuditIQ)

Category	Awareness	Consideration	Purchase	Use	Ask	Engage
Key Stakeholders	QC Manager, Underwriting Manager, Operations Analyst	VP Underwriting, Director of Compliance, IT Security	CRO/VP Lending, CFO, Legal Counsel, CIO	Underwriters, QC Analysts, Quality Team Leads, Operations Coordinator	VP Underwriting, Head of Ops, Product Champion, IT Admin	EVP/Chief Risk Officer, VP Strategy, Operations Leadership, Advisory Board
Why They're Here	Defect rates rising, analyst turnover high, investor scorecards tightening	Prove AI accuracy, ensure Encompass integration, quantify ROI	Secure board approval, confirm compliance/security, lock pricing	Adopt AI into workflow, build confidence, identify quick wins	Customize investor rules, expand checks, reduce false positives, scale branches	Unlock fraud detection, build competitive moat, establish thought leadership, new revenue
Top Questions	Why now? What's defect cost? Can AI work? How do peers use it?	Does it integrate with Encompass? Accuracy rate? True cost? Timeline?	What's payback period? Year 1 ROI? Security certifications? Uptime SLA?	How do I use this? How confident in recommendations? How measure gains?	How tune investor rules? Auto-update guidelines? Reduce false positives? Scale branches?	What's your roadmap? Fraud detection? Compliance risk automation? Co-dev options?

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Top Influencers	MBA research, HousingWire, LinkedIn peers, investor scorecards, internal champion	Hands-on pilot, peer case studies (same investors), third-party validation, IT security review	Executive sponsor (peer lender), successful pilot, legal/compliance review, reference calls	Internal champion/co-trainer, peer analysts, support responsiveness, user community, early wins	Support team, user community, advisory board, release notes, peer feedback	Customer success manager, advisory board, peer networks, conference speaking
Most Impactful Content	Benchmark report (defect costs), infographic (burnout), thought leadership, QC failure case study	ROI calculator, comparison matrix, integration checklist, recorded demo, peer case study	Executive summary (1-pager), implementation roadmap, security/compliance docs, pricing scenarios, pilot template	Interactive onboarding (loan-by-loan), 30-day quick-start, micro-videos (1-2 min), peer success story, metrics dashboard	Investor guideline templates, advanced workflow webinars, peer lender case study, FAQ library, certification program	Quarterly business review template, roadmap webinar, advisory board co-creation, co-authored research, beta access

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Top Channels	Google search (AI mortgage QC, defect reduction), LinkedIn, MBA newsletters, HousingWire, industry Slack	Company website, webinars (30-min demo), MBA trade shows, email nurture, YouTube, retargeting ads	Direct sales (warm intros), executive roundtables, LinkedIn outreach, reference calls	Customer portal, email (weekly tips), Slack, lunch-and-learns, success dashboard, CSM check-in	Support portal, monthly webinars, customer community, release notes, direct support channel	Newsletter, LinkedIn, conferences, advisory board, referral program, partnership announcements
Content Packaging	Infographics, explainer video (2-3 min), blog series, benchmark report (gated), CEO article	ROI calculator (interactive), comparison matrix (PDF + web), white paper, recorded demo, case study PDF	Executive deck (10-15 slides), Gantt chart, pricing proposal, security checklist, pilot summary	Step-by-step onboarding, quick-reference guides, micro-videos, testimonial video (2 min), metrics dashboard	Advanced workflow guide (PDF + video), webinar library (searchable), rule-builder sandbox, FAQ/knowledge base, 24/7 chatbot	QBR deck, roadmap presentation, customer spotlight story, real-time metrics dashboard, co-authored research