

Closer Scorecard

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Closer Performance Scorecard

The Housing Assistant



Overview

This scorecard provides a standardized framework for evaluating the performance of the closer. It supports organizational objectives by aligning performance measurement with operational procedures (SOPs) and key performance indicators (KPIs). Scorecards are essential for ensuring consistency, accountability, and ongoing process improvement across mortgage operations.

Why Scorecards Matter

Scorecards promote transparency and consistency across roles. When paired with documented SOPs and team KPIs, they:

- Help maintain compliance with investor and regulatory expectations
- Provide a quantifiable baseline to assess performance trends
- Serve as tools for coaching, recognition, and corrective action
- Create a feedback loop to improve workflows and customer satisfaction

THA Note: This scorecard should be treated as a baseline and tailored to the organization's specific metrics and goals.

Performance Evaluation Metrics

Performance Metric	Target
Docs Sent within SLA	≥ 98%
Errors in Closing Package	≤ 1%
CD Balancing Turn Time	≤ 24 hours
Funding Delays	0
Escrow Agent Feedback	Positive

Description

This scorecard measures critical pre-funding activities. Accuracy and timeliness at closing directly impact borrower experience and funder satisfaction.