

Servicer Expectations & Client Relationships

Where expectations meet execution



Moderator: Talia Ramirez

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Session Objectives

- Understand servicer expectations in 2025
- Identify top challenges in client-provider relationships
- Explore strategies for stronger collaboration
- Learn practical communication and transparency tools

Why This Matters

- The relationship between servicers and field providers defines how effectively our industry adapts, performs and protects communities.
- This session isn't about theory; it's about what actually works.



Audience Poll

- Question: What is the #1 cause of friction in client-provider relationships?
 - Communication gaps
 - Misaligned expectations
 - Reporting/documentation issues
 - Pricing & performance pressure
 - Turnaround time / SLA conflicts
 - Other (write-in)
- What surprises you the most by the answers in the room?



Expectations & Alignment

- What makes a field partner indispensable?
- For servicers, what do you really need the most today from your field partner(s)?
- For field providers, what do you really need the most today from your clients?
- How do you align expectations when requirements shift?
- What do providers wish servicers understood about on-the-ground realities? Where do you see gaps in servicers' understanding of field realities?
- What do servicers wish providers better understood about the realities of servicing?
- Key Takeaway: Alignment builds trust and reduces escalations.

Transparency & Accountability: How Much is Enough?

- What does transparency *really* mean from your side of the relationship?
- Is there such a thing as *too* transparent?
- For field providers, where does transparency start feeling like micromanagement?
- To what extent do you engage in educating a client when you believe their perspective, approach, or direction may not be aligned with best practices?
- For servicers, what data or visibility helps you sleep better at night?
- How can data and reporting be used collaboratively, not punitively?
- If we could design one shared reporting view, what would be on it?
- How do performance scorecards impact relationships?
- Key Takeaway: Transparency builds trust and drives continuous improvement.

Audience Poll

- Question: What's the fastest way to rebuild trust after a breakdown?

- Transparency about what went wrong
- Fast Corrective Action
- More Frequent Check-Ins
- Joint Review of Expectations
- Other (write-in)



- For Discussion: What are some examples of trust regained and what made it stick?

Communication: The Breakdowns & Fixes

- When communication goes wrong, what's usually at the root?
- What are some signals that expectations aren't aligned?
- How do we handle tough conversations without losing partnerships?
- Is there a 'communication rhythm' that works best? Daily, weekly, milestone-driven?
- How can teams communicate issues before they become compliance problems?
- What's one practice that's improved responsiveness in your organization?
- What escalation models work best?
- Key Takeaway: Proactive communication prevents breakdowns.

Meeting Requirements Without Burning Out

- How do servicers handle changing investor or regulatory requirements, and how do field providers keep up?
- When compliance requirements shift, what helps or hurts the partnership?
- How can providers flag capacity limits before quality is affected?
- How are technology platforms helping or hindering collaboration?
- Are current tools meeting both sides' needs?
- What integrations could improve transparency?
- Key Takeaway: Smart data sharing strengthens relationships.

From Vendor to Partner: The Evolution of Trust

- What's the difference between being a vendor and being a trusted partner?
- For servicers, what builds your confidence in a provider?
- For field providers, what builds your confidence that a servicer values your work?
- If we had a 'partnership playbook,' what would the first rule be?
- If you could redesign the relationship model, what would change?
- What does a strategic partnership look like in 2025?
- What one mindset shift would you recommend industry-wide?
- Key Takeaway: Move from transactional to strategic partnerships.

Final Takeaways: Better Expectations —→ Better Outcomes

- Remember:
 - Clarity over complexity
 - Transparency over reporting volume
 - Partnership over procurement
- The goal is mutual success. Invest in understanding your vendor's capabilities, challenges and insights. Decisions are driven not only by cost, but by value, quality, innovation and reliability. Both sides benefit from trust, open communication, and long-term collaboration.
- Thank you for participating!
- Encourage attendees to strengthen partnerships post-summit.
- Quote: 'Strong partnerships are built on transparency, accountability, and shared success.'
- Continue the conversation during December UNLOCKED Podcast

THANK YOU FOR JOINING TODAY!