

Modernizing the Mortgage Experience:

Barrett Financial Group's Nationwide Expansion with RapidScale



PARTNER
AI Services
Competency

- Agentic AI Consulting Services
- Generative AI Consulting Services

Barrett Financial Group, a fast-growing family-led mortgage brokerage, expanded from 250 to 2,500 employees and now operates in 49 states – all due to the organization's drive to innovate and leverage technology to be #1 in the mortgage industry. By partnering with RapidScale, including AI solutions built on Anthropic's Claude models, Barrett doubled loan volume, cut manual work by 85%, improved data security, and achieved significant annual efficiency gains through custom automation and cloud solutions.

Challenge

Prior to RapidScale, Barrett Financial did not have a dedicated internal IT team to support its scaling business. They also wanted to eliminate operational bottlenecks that would hinder recruiting and retention.

Other challenges included:

- Relying on manual, repetitive processes, including tedious data entry for loan logging and processing, spreadsheet-driven payroll, and compliance tracking.
- Rising security and regulatory pressures, including phishing threats and data privacy obligations.
- The need to ensure technology could scale with its aggressive goal of increasing headcount over the next five years.

The business couldn't afford to slow down. Barrett Financial's leaders saw that failing to modernize would impact revenue, recruiting, compliance, and client experience. Manual processes delayed loans and reduced loan officers' efficiency, causing wait times for borrowers. Modernization became essential for continued growth.

Solution

Before embarking on this new phase of modernization, RapidScale had established a strong foundation of reliability and security for Barrett Financial to operate confidently on a national scale.

RapidScale delivered:

- Nationwide dedicated fiber connectivity, delivering stable, high-performance networks across all Barrett Financial offices. This is essential for loan closings, wire transfers, and real-time borrower communications.
- Managed WiFi to unify office connectivity, ensuring consistent system performance for employees, no matter what office they sit in.
- Strengthened email security with Mimecast, DMARC, and Microsoft 365 security upgrades to protect confidential company information and block phishing attacks and spoofed websites.

Barrett Financial also embarked on a broader AI transformation, built on Claude, Anthropic's family of large language models, accessed securely through Amazon Bedrock in a RapidScale partner-managed AWS environment. This foundation supports Barrett Financial's growing use of intelligent automation across the business.



"We had a department where seven employees were doing the same manual task. Today, that process is automated down to one person, and the rest of the team has been reallocated to revenue-generating work".

Brayden Farr,
Chief Investment Officer
Barrett Financial



RapidScale delivered:

- Cloud migration from local servers to shared, secure, nationwide access.
- New cloud data platform: AWS data lake for analytics, forecasting, and AI training, extended with Amazon Bedrock to give Barrett Financial secure access to Claude models for advanced AI use cases.
- Custom AI and automation solutions purpose-built for Barrett Financial's mortgage workflows, powered by Claude via Amazon Bedrock:
 - **Loan log automation** – Consolidated a six-person manual team down to one, thanks to AI-driven data extraction and validation.
 - **AI-driven document processing** – Using Claude via Amazon Bedrock for intelligent document processing, automated the extraction of loan data from high-volume closing packages and eliminated manual re-entry, increasing compliance confidence.
 - **Custom internal portal (intranet)** – Developed a custom internal portal to unify loan tools, HR resources, lender lists, and department-specific automations with personalized dashboards for loan officers, payroll, operations, and leadership.
 - **AI scenario and product qualification assistant ("Chat Barrett")** – Powered by Claude via Amazon Bedrock, this assistant answers complex loan scenario questions in seconds, supporting house-hunters in real time, which empowers loan officers without manager intervention.

Furthermore, Barrett Financial plans to use AI tools to automate its payroll engine and streamline complex, high-volume compensation workflows. This is expected to deliver millions in annual savings, enabling growth without adding headcount.

Key outcomes & business impact

Cox Business and RapidScale improved productivity, enabling seamless collaboration across time zones. Their solutions also increased efficiency, reduced costs, and supported scalable growth.

Key outcomes included:

85%

Reduced repetitive work by 85% in loan logging.

\$280K

Multi-employee workflows consolidated into one AI-supported process, saving \$280K yearly. Employees' time was reallocated for revenue-producing work.



Loan processing volume more than doubled to over 3,000 a month.

1 Million

Over \$1M in projected annual savings from payroll automation.



Loan officers increased from 250 to over 2,100.

Faster borrower qualification and increased client experience:



AI provides answers to customers quickly and connects them with the right employees.



Faster loan decisions provide better support to weekend house-hunters.



Contributed to 4.9 stars across 4,000+ reviews.

Long-term innovation strategy:



Ongoing AI, automation, and cloud tool development, built on Claude models delivered through Amazon Bedrock as the core AI engine.



Continuous lifecycle of consulting/advising, implementation, and management services from RapidScale fuels Barrett Financial's innovation engine, positioning them to remain #1 in the mortgage industry.

Why RapidScale?

RapidScale led a high-touch discovery and design engagement, leading to modernization and impactful transformation:



Two full days onsite, meeting with more than 100 team members across every department to identify automation opportunities.



Workflow shadowing, uncovering inefficiencies in loan logging, payroll, onboarding, compliance, and document processing.



Rapid, iterative prototyping, guided by weekly check-ins with real users to refine tools until they matched Barrett Financial's exact needs.



RapidScale provided seamless, disruption-free implementations across multiple states, comprehensive training for every division, and a proactive approach to issue resolution and security. Their human-first, consultative method resulted in custom-built, non-generic solutions tailored to Barrett Financial's unique needs, laying a future-ready, scalable AI (including Anthropic's Claude models via Amazon Bedrock) and cloud foundation.

rapidscale



**Unbiased Cloud.
Uncompromising Outcomes.**

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