



## Business Analyst - Case & Behavioural Interview

### ABOUT THE INTERVIEW

There are 2 parts to this interview, which will focus on the following 7 skills:

- 1) Ability to perform research
- 2) Critical thinking and dealing with ambiguity
- 3) Attention to detail and analytical skill
- 4) Adaptability and willingness to learn
- 5) Work ethic and grit
- 6) Ability to think from someone else's perspective
- 7) Ability to communicate effectively

At first, you will deal with 3 separate cases, which we expect should take some time to read through and solve. Please understand that some of these could take hours, days, or even weeks to fully “solve”. We are not asking for you to solve them, but to instead put forward an honest effort so we can see your ability to tackle these sorts of problems within our company. We have put together a rough estimate of the time we expect to sufficiently solve each problem (it could take less, it could take more). Each case represents a different aspect of what you will need to deal with as a business analyst at Mortgage Automator.

The second part is a list of questions that the product team put together. This is the team you would be working with regularly, and they have each submitted a question they want the answer to in order to get to know you better.

### SUBMISSION

You will have up to 3 days (72 hours) to submit your response to all questions contained here, from the time it was emailed to you. There is no discussion that occurs with your submission, you will simply send in a powerpoint, excel, word document (or other) as your submission to all the questions (feel free to use whatever tool you want to answer the questions, and submit as a package at the end).

### **Business Analyst - Round 2 - MY NAME HERE**

i.e.

**Subject:** *Business Analyst - Round 2 - Jane Doe*

If we like your submission, round 3 will be an in office discussion about your submission, where the team will have a chance to ask you questions on your approach, as well as a chance for you to ask questions about the team you would be working with.

If you do not move onto the next round, we will be happy to provide feedback on your submission, should you want some. Good luck!



## Case Interviews

### QUESTION 1 - BORROWER PORTAL (2 - 3 hours estimated)

You have just been assigned as the business analyst to a new client of Mortgage Automator.

Your client is a lender that operates in the private lending industry in Toronto, Canada. Your task is to help them build out a Portal experience for their clients (borrowers). The client offers 3 loan types:

1. Residential Loans
2. Fix and Flip Loans
3. Lines of Credit

Your task:

1. What are the various interactions (for the borrower and for the lender) and key characteristics of the portal that you think will be necessary to facilitate a good experience?
2. What should the borrower's journey (user flow) look like? Feel free to submit hand-drawn flowcharts, tables or bulleted lists.
3. What should the UI look like for the minimum viable product that could be launched within the month (assume 3 strong developers on staff)? Feel free to submit hand-drawn sketches, or whatever you prefer)

**Here's what we are looking for:**

1. Structured thinking and approach - Your ability to process information and think critically/logically to generate powerful insights.
2. Creative thinking - Impress us!
3. Communication - Your ability to present information and explain complex relationships clearly, concisely, and effectively.
4. Your ability to do quick targeted research and gain a quick understanding of the unknown.

### QUESTION 2 - WORKFLOW (0.5 hours estimated)

You're a Business Analyst at Mortgage Automator and you've been assigned to a project to optimize a critical workflow.

In your first few weeks, we discovered that multiple lenders on our platform have been experiencing delays, leading to increased turnaround times for approvals and funding.

1. How would you approach this situation?
2. Can you outline the steps you would take, any key factors or actions you would take?

**Note:** This is all about the APPROACH you would take, not about solutioning what the problem would be.



### QUESTION 3 - DATA ANALYSIS (0.5 - 1 hour estimated)

A new client has come on board and you have been tasked with helping out the data migration team because they are absolutely swamped this week.

Our team has provided the client with an import template to utilize. The template version of our import template can be found here: [IMPORT TEMPLATE](#) (remember to watch the instructions)

Instructions on how to fill it out can be found here: [IMPORT INSTRUCTIONS](#)

**Passcode:** 3J9+u#&P

Typically, an import of this size should take at least a week to prepare from the client's end, and at least a few days to review from our end, once completed. However, the client sent back their "Completed" import 2 hours after receiving the template. The Data Migration team knows it's going to be an absolute disaster, and it seems like the client is trying to offload all the work of preparing their data onto our team. The Data Migration team has asked you to:

- 1) Identify/categorize the types of mistakes that have been made in filling out the import template, as well as note down specific examples for the client so that they can spend time fixing it up.
- 2) Help structure an email back to the client, asking them to please correct their mistakes, so we don't have to take on the workload of cleaning up their data.

The client's completed import is available [VIEW IMPORT](#).

We put together a quick video summary of the request here: [VIDEO SUMMARY](#)

**Passcode:** 3J9+u#&P

**Note:** Do the best you can here, as there are likely too many issues to find. If you are unsure if something is actually an issue, feel free to add it anyways and note down your assumptions as to why you feel it's an issue.

## Behavioral Interview

Below is a list of questions provided by the team. Feel free to write out your answers, record a short video, or answer them through any means you'd prefer:

1. Describe a scenario where you had to challenge the status quo in your life (i.e. when someone told you "That's just how it's always been done"). Give us the situation, what you did, and why you decided to challenge them/the situation.
2. Tell us a situation in work or outside of your life where you failed. What was your goal, what was your failure, and what, if anything, would you do differently given the opportunity again? How has this impacted you as a person?
3. If you have to decide between producing quality work and meeting deadlines, how do you make the decision? What is more important to you and why?