

JASON DALE BATES

Operations Management | National Team Leadership | Mortgage Industry

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PROFESSIONAL SUMMARY

Results-driven mortgage operations leader with 15+ years of progressive experience across origination support, pipeline management, and national team leadership. Built and scaled a national Loan Originator Assistant team from 2 to 26 members—including 4 specialty teams—currently supporting 70–75% of total company loan production across 110+ Loan Originators nationwide. Expertise across the full mortgage loan lifecycle, from TBD and pre-approval through disclosure, underwriting submission, and processor handoff. Recognized for engineering workflows that accelerate production, translating executive vision into operational execution, and provided insight and direction to the team who built reporting infrastructure that enables data-driven decisions. Combines proven leadership with modern AI tools, capacity modeling, and analytics to continuously elevate team performance and organizational output.

CORE COMPETENCIES

- Operations Management
- National Team Leadership
- Workflow Design & Optimization
- Pipeline Management
- Capacity Planning & Staffing Models
- Recruiting, Hiring & Onboarding
- Training & Team Development
- Mortgage Loan Lifecycle (Full)
- Broker & Wholesale Pipeline
- Reporting & Dashboards (PowerBI, HubSpot)
- AI-Powered Problem Solving & Modeling
- Cross-Functional Collaboration

PROFESSIONAL EXPERIENCE

Operations Manager & National Production Fulfillment Group LOA Manager

Aug 2023 – Present

Envoy Mortgage, Ltd. / PLACE | Houston, TX | Remote / National

- Built and scaled a national Loan Originator Assistant team from 2 members to 26—including 4 specialty roles covering Broker, Renovation, Construction, and Onboarding—serving 110+ Loan Originators across the United States.
- Team currently supports 70–75% of Envoy’s total loan production, spanning TBD-to-qualification through Contract-to-Processing Hand-off and UW submission workflows.
- Worked with Leadership to design and implement end-to-end team workflows and operational processes from the ground up—covering file intake, disclosure management, UW submission, and processor handoff—ensuring accuracy, compliance, and speed.
- Partnered with executive leadership to define preferred workflows from lead through funding, providing operational insight that shaped company-wide process standards.
- Provided insight that helped a team develop reporting dashboards in PowerBI and HubSpot that are used to measure team performance across units processed and turn times, enabling data-driven staffing and performance decisions.
- Developed an AI-assisted Capacity Model used for team gearing and staffing forecasting; applied AI tools (Claude AI, ChatGPT, Microsoft Copilot) for research, operational reporting, and problem-solving.
- Owns the full talent lifecycle for the National LOA Team: partners with HR on job requisitions, screens and interviews candidates, makes final hiring and compensation decisions, and executes onboarding plans.
- Provides branch-level LOA hiring support nationally—identifying and securing high-quality talent for both the national team and individual branches.
- Hired and developed a Team Lead responsible for day-to-day task delegation and direct training of team members.

- Manages broker pipeline company-wide, helping Loan Officers track and accelerate deal movement through lender and internal funding timelines.
- Serves as senior daily escalation resource for team members and LOs on complex loan scenarios—resolving conditions, identifying solutions, and driving files through the loan manufacturing process.
- Leads back-to-back operations calls, contributes to weekly and monthly sales force presentations, and engages in strategic planning sessions with executive leadership.

Operations & Pipeline Manager

May 2018 – Aug 2023

[Envoy Mortgage, Ltd.](#) | Houston, TX

- Managed active loan pipeline for the Houston, Kingwood, and The Woodlands branches; led weekly pipeline meetings and maintained detailed status reporting to keep all production staff aligned and on track.
- Served as primary operations resource for origination and processing teams on file restructuring, guideline research, AUS execution, condition clearing, rush requests, and cross-departmental escalations.
- Maintained branch-wide file quality control, reviewing pre-qualification and pre-approval files and delivering targeted coaching and training to LOs and LOAs.
- Communicated proactively with LOs, LOAs, title companies, appraisers, insurers, and clients to keep files moving and manage expectations in real time.
- Delivered monthly production projections and pipeline status updates to branch leadership; built strong cross-departmental relationships to streamline escalations and rush processing.

Branch Captain / Loan Officer Assistant

May 2016 – May 2018

[Waterstone Mortgage Corporation](#) | Houston, TX

- Supported the Branch Manager’s full pipeline—managing active deals, converting leads, and ensuring smooth movement from pre-qualification through funding.
- Collected loan applications and documentation, structured loan scenarios, and submitted files to underwriting for pre-approval; made direct calls to clients to deliver challenging news and navigate solutions.
- Maintained lead and referral partner databases; collaborated with Realtors, builders, and title companies to build and sustain strong referral relationships.
- Served as the branch’s primary point of contact for resolving pre-qualification issues, suspended files, rush requests, and complex income scenarios requiring creative structuring.
- Supported multiple LOs simultaneously with active deal management, processing coordination, and real-time borrower updates.

Loan Officer Assistant / Mortgage Banker

Jul 2012 – May 2016

[Envoy Mortgage, Ltd.](#) | Houston, TX

- Assisted Branch Manager in converting leads to closed loans; managed personal pipeline, took mortgage applications, structured deals, priced rates, and hosted client meetings.
- Maintained consistent contact with borrowers, Realtors, builders, and title companies throughout the loan process; participated in daily and weekly pipeline and goal-tracking meetings.
- Earned and maintained NMLS Mortgage Loan Originator License (#406344) in Texas; developed independent referral relationships while supporting broader production team goals.

Home Mortgage Consultant

Oct 2010 – Jul 2012

[Wells Fargo Home Mortgage](#) | Missouri City, TX

- Consistently met and exceeded production quotas; selected for multiple bank-wide pilot programs including Builder Team, Accelerated HMC, and High Performing Sales—ranking among top performers within peer group in first year.
- Mentored new hires and tenured colleagues on systems, loan guidelines, and client management; cultivated strong internal and external referral partner relationships.

EARLIER CAREER (PRIOR TO OCTOBER 2010)

A career built on sales leadership, account management, recruiting, and team development across diverse industries—providing the management and communication foundation carried throughout a 15-year mortgage career.

Nat'l Account & Service Manager / Reg. Sales Manager — [MotorSkill Venture Group \(Lifeline Energy / Uptown Solar\)](#) *Apr 2008 – Oct 2010*
Account Executive – SAP Recruiting — [SearchPath Houston \(SPI\)](#) *Jan 2007 – Apr 2008*
Inside Sales Lead Specialist & Trainer — [The Lead Dogs – Client: Adobe Systems](#) *Apr 2003 – Oct 2005*
Computer Systems & Peripheral Sales Specialist — [Dell Computer Corporation](#) *Aug 2001 – Apr 2003*
Investment Specialist – Series 6 & 63 Licensed — [Janus Capital Group \(Mutual Funds\)](#) *Jan 2000 – Apr 2001*

EDUCATION

University of Texas at Austin

Graduated 1999

Bachelor of Business Administration (B.B.A.), Marketing

Bachelor of Arts (B.A.), Japanese Language

LICENSES & TECHNOLOGY

Mortgage License: NMLS Loan Originator #406344 – Texas

Mortgage Systems: Encompass, AUS (DU / LP), LOS Platforms, Full Loan Lifecycle (TBD / Contract Sub & Hand-off Focus)

Reporting & Analytics: Microsoft PowerBI, HubSpot CRM & Reporting, AI-Assisted Capacity Modeling

AI Tools: Claude AI (desktop & web), ChatGPT, Microsoft Copilot — applied to capacity planning, workflow creation, operational reporting, and problem-solving

Productivity: Microsoft Office Suite (Word, Excel, PowerPoint, Outlook), Salesforce / Jungo CRM

Historical: Series 6 & Series 63 Licenses (Janus Mutual Funds)