

ATOM BANK FINANCIAL SERVICES

ION

SELL FASTER AND SMARTER
RAPIDLY ACCELERATE GROWTH
OUTPERFORM YOUR COMPETITORS



ATOM BANK

FASTEST GROWING UK MORTGAGE LENDER



Atom Bank is a digital financial company and challenger bank. It provides banking services through a smartphone app. It has no physical outposts.

As a smartphone app-based bank, it does not have a traditional online banking outlet, as users must use the application to bank.

CHALLENGE

To enable to continue its growth as 'the fastest growing UK mortgage lender', Atom Bank needed to systemise and scale its business mortgages division, which works directly with intermediaries.

As well as increasing volume of sales, it was necessary to have an effective mortgage pipeline that could be monitored and tracked quantitatively.

SOLUTION

Atom Bank decided to implement Salesforce, the world's most powerful customer relationship management system and used by over 150,000 companies worldwide. Working within Financial Services, it was essential that the platform was robust and secure.

To streamline the mortgage application process, a defined sales pipeline was created, which incorporated multiple business loan quotes per enquiry.

The opportunity captures key information about the application, such as value of purchase, LTV, etc. The quote allows a number of variable parameters to be configured, enabling multiple customised quotations. Each opportunity and associated quotes are tracked by unique reference throughout the process.

Once a quote is complete, an email is then automatically generated, sending out all the details of the business loan to the appropriate intermediary.

RESULTS

Atom Bank's quoting process has significantly improved through a manageable centralised database and increased visibility of customer data. They are now equipped with a system that will allow them to effectively scale the mortgages team, whilst providing real-time KPIs.

FEATURES

- Bespoke mortgage pipeline.
- Multiple quote management.
- Automated communications.
- Centralised application data.

BENEFITS

- Reduced administrative time.
- Improved sales with a faster and smarter process.
- Improved intermediary engagement.
- Improved insights, reporting and forecasting across the department.

ABOUT ION

ION enables its customers to sell faster and smarter, rapidly accelerate growth and outperform their competitors at every level.

This is achieved through the implementation of the worlds most advanced enterprise cloud technologies and the tactical delivery of business and financial transformation services.

Established in 2016, ION is a Salesforce registered consulting partner and a Sage Financials implementation partner, specialising in healthcare, financial services and non-profit.

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HIGH PERFORMANCE BUSINESS TRANSFORMATION

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