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Desouza and Associates Inc.

Mortgage Services Company leverages Sales Cloud to personalize transactional messages to key stakeholders

Company Category: SMB (< USD $10 Million)
Application Involved: Salesforce Sales Cloud

The Customer

As a Mortgage Services Company, our Customer offered lending services to residential and commercial clients through a network of 100 mortgage advisors. A typical mortgage transaction has multiple steps from request through the approval process and there were also multiple individuals involved in the transaction such as the Buyer and Seller Real estate Agents, Lawyers, Referrer etc. in addition to the client. Throughout these steps, the customer needed to communicate with all of the individuals related to the transaction and also personalize the communication as coming from the mortgage advisor.

Key Challenge:

The customer originally expected to use Pardot to send out communications, but given the complex relationships between the different individuals, the client and the advisor, the need for personalization, the number of times the Opportunity record was updated through the mortgage approval process, and the volume of emails, a custom solution was required.

Standard Sales Cloud workflows/process builder functionality could not be used as the owner of the Opportunity changes through the approval process affecting the sender record in the communication.

Our Solution

1. Configured a set of templates in Sales Cloud.
2. Created a custom object with Apex code to write the original owner as well as the other individuals related to the transaction.
3. Created a custom coded Apex solution to check records that were updated and trigger personalized emails to all of the individuals related to the transaction.
4. Created a reporting mechansism to flag errors as well as track emails sent and to whom per transaction step.

Results

1. Fully automated and scalable solution.
2. Emails were indepenedent of the code and could easily be updated by the customer at any time.

1-800-536-9027
www.desouzaandassociates.com
e: info@desouzaandassociates.com