



Industry: Financial/Lending

Products Used: Sales Cloud

Integration: handwrytten, housecanary

A financial Company using the CRM built for the Modern Loan Originator to help structure, manage, and grow their businesses.

Challenges

Customer expected a solution which allows them

- To fill up the information of their Borrower/Co-Borrower who shows interest in the services
- Information shall be traverse through the various stages of prospect
- Screening of Merchants through “Under Writing” process
- Process of sending Referrals to Loan Officer
- Prospect conversion to deal
- Missing 360-degree view as well as analytics of their customers
- Taking Survey from the Customer post deal is closed

Solution

- Custom solution was designed and developed for capturing multiple stages of process.
- Sales team can dispatch pre-approval letter to borrower/co-borrower for speedy action.
- Solution was designed with various Reports/Dashboards
- Stages are defined and each stage define the process for execution.
- Responsive customization to meet industry and company-specific requirements in term of processes and data capturing.
- Flexibility of capturing information and attaching of documents pertaining to business needs
- Archiving the documents to ensure minimal storage is used for business needs

Result

- Easy access to all the data points from any location via a well-versed user’s screen.
- Information is in Real-Time and up-to-date and.
- Eliminating management oversight of tracking the critical information about the specific stages
- Customization to meet industry and customer-specific requirements in term of processes and data capturing.
- Complete 360-degree information for the Customers

Process-Snapshot (Capturing Information to Lending Services)

New Prospect

First Name Pranali	First Name - Co Neha
*Last Name Kambarkar	Last Name - Co Harle
Email pranali@techilaservices.com	Email - Co neha@techilaservices.com
Phone - B +918080038544	Phone - Co +918080038544
*Buyers Agent test HOI Contact	*Referral Source test HOI Contact
*LO Pranali Kambarkar	*Client Scenario Default

Prospects

pranali tgs | test kam1 | Test PP | tgs tea

PP | Submitte... | UUA | Docs Out | Nurture | Cont

Lead Status: PP

OK to send Pre-Approval Letter?

Pranali Kambarkar	Text <input checked="" type="checkbox"/>	Email <input checked="" type="checkbox"/>
Neha Harle	Text <input checked="" type="checkbox"/>	Email <input checked="" type="checkbox"/>

Name: Pranali Kambarkar, Neha Harle
Legal Name: Pranali Kambarkar, Neha Harle
Email: pranali@techilaservices.com, neha@techilaservices.com

Prospects

test kam1 | Test PP | tgs tea | Daniel T... | Pranali... | New Prosp... | test

Item Name	Borrower(s)	Assigned to	Status	Last Activity
Business Tax Returns - 2019	Pranali & Neha		Upcoming	few secs ago
Business Tax Returns - 2020	Pranali & Neha		Upcoming	16 mins ago
Select All				
Child Support Agreement	Pranali & Neha		Ready to Send	few secs ago
Business Tax Returns - 2020	Pranali & Neha		Ready to Send	few secs ago
Business Tax Returns - 2019	Pranali & Neha		Ready to Send	few secs ago
Request Items Needed				
Select All				
Disability Award Letter	Pranali & Neha		Sent	few secs ago
Federal Tax Returns - 2019	Pranali & Neha		Sent	few secs ago
Business Tax Returns - 2020	Pranali & Neha		Revision Needed	few secs ago
Child Support Agreement	Pranali & Neha		Sent	2 mins ago
Send Now				
Next Follow Up: Tue Oct 21 2023 09:36 AM				
Select All				
Disability Award Letter	Pranali & Neha		Pending Review	2 mins ago
Federal Tax Returns - 2020	Pranali & Neha		Pending Review	few secs ago

Buyer Profile Sent: NO

Prospects | pranali t... | test kam1 | Test PP | tgi tea | Daniel T... | Pranali... | New Prosp... | test

Item Name | File | Borrower(s) | Assigned to | Status | Last Activity

- Business Tax Returns - 2019 | [comment icon] | Pranali & Neha | [avatar] | Upcoming | 6 mins ago
- Business Tax Returns - 2020 | [comment icon] | Pranali & Neha | [avatar] | Upcoming | 20 mins ago

Archived

<input type="checkbox"/>	Item Name ↓	File	Borrower(s)	Assigned to	Status
<input type="checkbox"/>	Disability Award Letter	[comment icon]	Pranali & Neha	[avatar]	Archived
<input type="checkbox"/>	Federal Tax Returns - 2020	[comment icon]	Pranali & Neha	[avatar]	Archived
<input type="checkbox"/>	Disability Award Letter	[comment icon]	Pranali & Neha	[avatar]	Archived

Unarchive Delete Cancel

Pranali & Neha's Mortgage Tasks

Item Name	Comment	Status	Upload +
Disability Award Letter - Pranali & Neha	[comment icon]	Item Needed	[upload icon]
Federal Tax Returns - 2019 - Pranali & Neha	[comment icon]	Item Needed	[upload icon]
Child Support Agreement - Pranali & Neha	[comment icon]	Item Needed	[upload icon]
Business Tax Returns - 2020 - Pranali & Neha	[comment icon]	Revision Needed	[upload icon]
		Completed	

Birthday Automation Active

Connect to HandWrytten [Settings](#)

Template message

Name: Garrett Locklear Test

Street: 12 Cadillac Drive Ste 180

State: TN


Card: Thank You for Your Business - Navy and White

Business Name: The Locklear Lending Team

City: Brentwood

Postal Code: 32322

Font: Casual David



Dear User,

Handwrytten uses robotic handwriting machines that use an actual pen to write your message. The results are virtually indistinguishable from actual handwriting.

Try it today!

The Robot

[Save Details](#)