THIRD PILLAR

A Globe BUSINESS COMPANY

LOANS MANAGEMENT SYSTEMS

Financial Services Industry

WHY USE LOANS MANAGEMENT SYSTEMS?

This system helps your sales team make the process of loan from Origination, Qualification, Loan Accounts Creation, and Payments simpler with the wonders of automation.

It improves transparency into business development, measures the outcome of success, and monitors the customer journey. You'll receive an efficient software setup, guidance, and sessions from a certified expert.

WHAT DOES THIS SYSTEM GIVE YOU?

Salesforce Customer 360
Provides a full and organized view of the accounts and dashboards where you can make decisions based on the information provided.

Organized view of loans
Track loan, person accounts, and organization process.

Onboarding
Allows your clients to onboard smoothly.

Tracking payment process
Lets you create a payment schedule and monitoring.

Analytic view
Gathering current financial data for monthly, quarterly, and annual reviews.

Out-of-the-box Leads Management Process
Track leads throughout their customer journey .

- ✓ Easy access to your leads and accounts data all in one place
- ✓ Powered with the world's #1 customer relationship management (CRM) software, Salesforce
- ✓ Designed to get you ready with Loans Management Systems in just six weeks
- ✓ Best after sales services in the business with expert guides and thought leaders in the industry to help you grow

PREREQUISITES:

- Existing Accounts / leads database
- Existing Loan accounts database
- A product list or offerings
- Product matrix showing terms and interest

WIDEN YOUR REACH NOW!
Consulting Partner
www.3rd-pillar.com

We are Third Pillar. We are CRM

CONTACT US NOW!

SCAN QR FOR A FREE CONSULTATION