

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



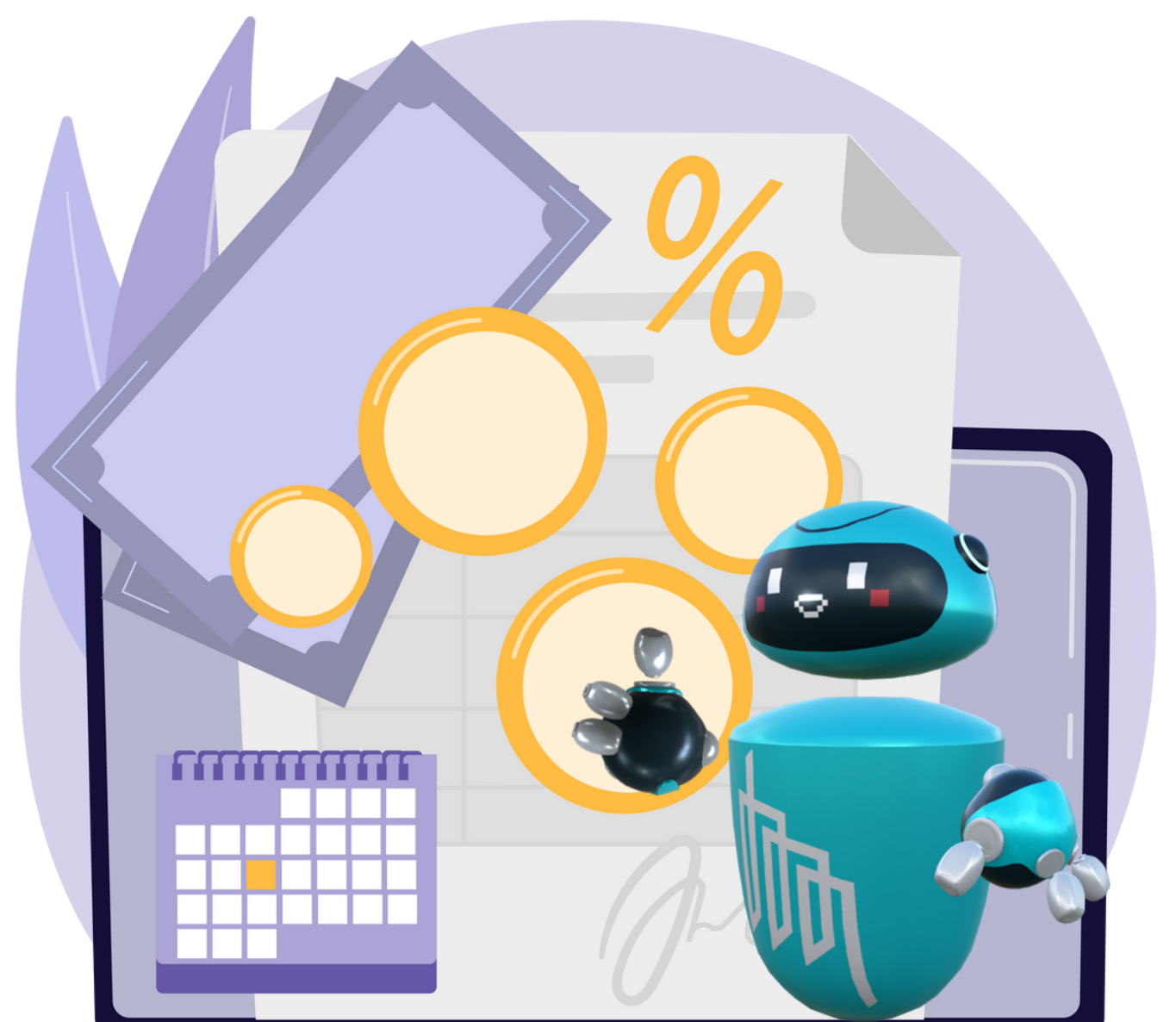
Designed to get you ready with Loans Management Systems in just six weeks



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



CONTACT US NOW!

WIDEN YOUR REACH NOW!

Consulting Partner
www.3rd-pillar.com

We are Third Pillar. We are CRM



SCAN QR FOR A FREE CONSULTATION