



WARPDRIVE
TECH WORKS

Customer Success Stories

Embracing innovation to drive new value for your organization

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Industry: Finance



Intelligent Asset-Management For Global Finance Innovators

This company is a global hedge fund with \$23 billion USD in administered assets and over 300 employees. They service 16,000 plans and aimed to improve efficiency by merging three different CRM platforms into one.

Solutions

- To minimize business risks, changes were planned in staggered phases for seamless transition between CRMs
- Discovery & planning: Assessment of functionality and customizations to begin the merge of platforms
- Lift & Shift: Configured and merged all three Orgs into one
- Enhancements: Suggestions and recommendations of improvements on existing applications

Service
Cloud



Sales
Cloud



Challenges

- Migration of two Salesforce Orgs (CRM & ERP) from Classic to Lightning
- Needed to test Salesforce application under the new lightning software
- Onboarding users to adapt to the new Salesforce application and model
- Migration of MS Dynamics CRM to Salesforce Org

Benefits/ Results

- By merging three platforms into one, the customer achieved a unified Salesforce guided-sales-process
- Real-time summarized view of business insights in the form of a dashboard for senior management
- Existing Orgs optimized to eliminate redundancy and inefficiency. Org refitted to be compliant with Salesforce best practices
- Achieved an overall increased platform adoption rate of 67%

Industry: Finance



A Gold Star for Automated Loan Innovations

This company is a leading Gold Loan “NBFC” owning more than 4000 branches across 25 states, and that ventured recently into micro loans for the first time. However, their manual process of lead management created disconnected data structure and siloed departments - slowing down their service.

Solutions

- Interactive web forms to capture leads in an intelligent and dynamic way
- Lightning flows to provide a guided journey to users - increasing efficiency
- Real-time integration with Ekyc and CIBIL service providers, reducing the lead qualification TAT
- Multiple CIBIL reports to support the credit team with assessments
- Configurable rule engines to automate the workflow

Service
Cloud



Sales
Cloud



Challenges

- No defined processes or sales-guidelines in place
- Inefficient handling between team members
- Significantly high disbursement during loans process
- Manual verifications against several databases affected Total Asset Turnover (TAT)
- On-boarding of users and training was significantly time-consuming
- Real-time reporting was difficult due to the manual system
- No integration between current Loan Origination System (LOS) and Loan Management System (LMS)

Benefits/ Results

- Lead management from multiple sources with no manual intervention, lead to increased productivity
- Reduced TAT for more insights on lead qualification checks against databases
- Seamless handovers between team members with tracking capabilities
- Overall reduced TAT for loan origination and processing, to keep up with competitors
- Accurate forecasting based on the data provided to management, with interactive reports and dashboards
- Seamless integration between LOS and LMS