

EMPAUA



DEUTSCHE
FIRMENKREDIT
PARTNER



Customer Success Story

DFKP- Customer Success Story
EMPAUA Germany



Overview

About the company

DFKP GmbH is a German company specialising in developing an innovative FinTech business involving the acquisition and comparison of credit loans for medium-sized companies.

DFKP was founded in November 2019, and they are already making an impact by facilitating access to corporate loans for mid-sized companies that will help them to scale up shortly. This German finance company's mission is to help companies navigate a rapidly changing financial world, thereby reducing the barriers to doing business.

The Salesforce Sales Cloud solution enables DFKP to simplify the search for the credit that these companies need. They combine a sophisticated digital financing process with experience-based, best-practice professional financial advice. The result is satisfied entrepreneurs and optimally financed businesses.

 **Company**

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 **Industry**

FinServ

 **Sector**

FinTech

 **Salesforce
Solution
Implemented**

Sales Cloud

Customer Challenges

DFKP is a company that works closely with its clients and must manage a very sophisticated database. So, the challenges included improving the internal operations system so that they could increase their response times, as well as other internal process improvements, detailed below:

- A new hyper-growth business process, including fintech processes in Salesforce, with a go-live deadline of 1.5 months.
- I am automating numerous customer and bank-specific communications to perform credit brokerage as quickly as possible.
- Creation of Web-to-Lead and conditional lead assignments for hot leads, equally distributed charges and duplicate account merge.
- Reduction of manual input and clicks for all processes, enabling financial advisors to spend most of their time advising their clients.
- Enablement of Credit Potential Analysis and estimation within a 24-hour customer interaction window.
- Improvement in deal-making speed by providing non-binding offers with interest estimations in real-time.
- Display of visually represented financial tables in Salesforce according to banking standards
- Development of easy-to-use customer document handling with automated document requests based on the requirements of the banks to be approached for credit.
- Improvement in the relationships with banking partners due to the professional quality of the information provided with each credit request.

Solutions

EMPAUA implemented a number of custom solutions in order to improve the client's experience with Salesforce.

Undoubtedly, the DFKP had very ambitious goals, which they wanted to be implemented in a very limited period. Our professionals are prepared for this type of demand, and they proposed the following solution:

- Development of a new Sales process engine based on matching banking and customer criteria, helping the financial advisors select the correct bank for each potential customer.
- Error prevention and data sanitation by including extensive validation rules on all objects.
- Generation of custom PDF documents, with the customer and bank data, directly from Salesforce.
- Integration of a third-party creditworthiness check.
- The synchronisation of bank request status with opportunity stages.
- Setup of AI-powered Einstein Activity Capture to automatically and intelligently log all tasks, events and emails to partners and customers within Salesforce.
- Integration of a third-party PDF analyser - User-friendly XML import, parsing and mapping to correct fields and objects in Salesforce.
- Automated creation of mandatory documents containing customer information based on the requirements of the requesting bank. Simplified record management by guiding the user experience with Flow.
- Full implementation of all GDPR requirements, including double-opt-in functionality.



Results

- Successful implementation and first go-live with a comprehensive and working solution 1 month into the project and ahead of the 1,5 months initial Go-Live goal.
- A strong transparent partnership between DFKP and EMPAUA, resulting in an effective way of implementing new features in an extremely agile manner
- Improvement and simplification of the Sales process, enabling financial advisors to spend most of their time talking with clients.
- Rapid user adoption due to the design of the user-friendly interface.
- Increase in team collaboration and improvement in internal communication using the Chatter functionality.
- 50% increase in the lead conversion rate.
- Automated reporting for management, using advanced KPI formulas.
- Improvement in client satisfaction.
- Increased number of partner banks working with DFKP.
- Greater data integrity leading to improved business intelligence reporting and decision-making.
- Cost efficiencies gains achieved through the ability of the Market engine to make calculations without any API connections.
- Strong and scalable data-model, which can easily adapt to more employees as well as additional regions and countries.



Successful implementation and first go-live with a comprehensive and working solution one month into the project and ahead of the 1,5-month initial Go-Live goal.

“ Without Empaua's knowledge, creativity and commitment, it would have been difficult to realize a project of this scale in such a short time frame. ”



Thomas Stanner
Head of Product
Management

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