

## Client

A fast-growing Insurance company, dedicated to serving all of the insurance needs of its customers

### Solution

**Salesforce**, Experience Cloud:  
Loan Payments Schedules  
Integration

### Industry

Insurance

## Challenge

Routine Automation was hired to develop a customized Salesforce solution for mortgage estimates and payment calculations from scratch. Also, the Client came up with the idea of creating an easy-to-use ecosystem to connect the client with the company's reps.

## Solutions

The RA Team got the Client covered by:

A customer-focused SALESFORCE KNOWLEDGE BASE containing mortgage information and helpful tips, f.ex customer card, documents required, FAQ, necessary contacts, etc. giving reps the ability to bring in all necessary information for a potential borrower.

Fast & accurate LOAN PAYMENT SCHEDULES directly in Salesforce were integrated.

RA Team implements the LOAN CALCULATOR that works within Salesforce. It increases loan processing speeds & creates schedules more consistently. Generate nearly any payment schedule. We add a calculator to the Salesforce system to collect leads.

CHATTER FUNCTION was also created. This made it easier for the client to communicate with the mortgage banker which improved customer experience by 25%. Reps can reach customers on any device and channel, whether by mobile, landline, email, or social.

The RA experts implemented a COMMUNITY PORTAL where clients can leave their applications for mortgage consideration. It makes it easy for customers to find answers in the community fast by automatically surfacing the information they need from multiple sources. As well as make it possible to process applications for mortgages faster and create a custom card.

## Results

- **An improved and more user-friendly lightning UI**

Simply saying, the Community Portal gets the ability for customers and partners to help themselves, and each other.

- **Ability to track mortgage process and payments**

Reduced complexity for loan officers and borrowers with guided, connected processes across any system or channel. Consolidated relevant data into a single view, made it easy to track progress, manage documentation, and collaborate every step of the way.

- **Documentation and e-signature functionality for mobile and tablet devices**

All data is filed electronically which simplifies the Client's document processes.

- **Two-factor authentication to enhance security**

An intelligent, mobile, two-factor authentication app that delivers enterprise-class security, while providing simplicity and convenience to your end-users. With Salesforce Authenticator, it's even easier for employees to access business-critical apps through simple push notifications.

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"We found a great flow of communication and work and we are happy with our business relationship. The engagement has successfully rolled out 90% of CRM operations. Routine Automation's development is streamlining communications, reducing response times, and increasing CSAT. The team understands company ideals and identifies client needs accurately to address issues that arise."