

Salesforce CRM

Loan Origination Solution Accelerator

If you are a Financial Services Company interested in a CRM and Loan Origination solution for ...

Solution specific to Financial Services for Loan Origination & Customer Onboarding
Short timeframe to Go-Live
Quick User Adoption
Faster Realization of benefits
Speed to Market

You should consider Process360's Loan Origination Solution Accelerator



Solution Details

- Lead Management & Qualification
- Loan Application Processing for Personal, Home, Vehicle & Business Loans
- Customer Profile, KYC & On-boarding
- Credit Verification & Approvals
- Generate Offers / Quotes
- Maintain Loan Agreements
- Disbursements & Amortization Schedules
- Track and Record EMI Payments
- Alerts for overdue EMI payments
- Execute Campaigns to target prospective clients
- Track Customer Service Requests

Features / Benefits

- Built on Salesforce Sales Cloud CRM solution
- Pre-built solution for LOS / KYC
- Customizable to customer business
- Dashboard Reports for Insights & Decisions
- Short implementation time-frame
- Faster ROI on License utilization
- No upfront infrastructure investment
- Extend solution with new modules / features

The LOS CRM Accelerator helps Financial Services companies manage complete Sales cycle from executing marketing campaigns, lead sourcing, lead qualification to loan application processing, customer on-boarding, KYC and document collection, credit checks, approvals, generating offers, disbursements, managing loan agreements, generating amortization schedules, tracking payments and addressing customer services requests.

The solution framework helps Financial Services companies manage complete loan processing and have a 360-degree view of their customers. The solution supports integrations with internal financial systems, external government and 3rd party credit agencies to check credit ratings and conduct credit checks on customers.

The solution can also be extended to financial services companies offering broad range of products like advisory, portfolio management, mutual funds to leverage the available lead management, application processing, customer verification, customer on-boarding and KYC processes.

If you would like to understand further details and discuss the Real Estate CRM Accelerator, Please contact will.sturt@processthreesixty.com or visit <https://www.processthreesixty.com/fins-loan-origination-solution-los/>