

Helping Speedy Finance to grant **Business Loans at speed** with **Salesforce**

Key Objectives:

- Implement automated credit reporting and monitoring solution into Salesforce environment.
- Streamline document workflow for a reduction of paperwork
- Enhancing Partner/Vendor experience across platforms.
- Streamline partner onboarding process, reduce human involvement & steps.
- Post lead submission, enable seamless lead partners–Speedy engagement.



Speedy Finance is a secured business lender specialising in 1st and 2nd mortgages for business purposes and has been helping Aussie Businesses since 2004.



Solutions Highlights:

- Implemented swift and secure document exchange using DocuSign to redefine their document management approach, resulting in a reduction of paperwork.
- Enabled loan underwriters to access real-time credit reports and monitor changes in a borrower's financial status
- Devised a self-serve Partner Portal aimed at elevating partner experience.
- Integrated CreditorWatch, a credit reporting and monitoring solution, into their Salesforce environment.
- Designed the system to access the Personal Property Securities Register (PPSR) data.

Salesforce Integrations:



Success Story – Business Loans

Value Delivered:

- Broker portal enhanced broker interactions, streamlined processes, and contributed to business growth.
- Automated workflows allowed partners to focus on value-added tasks.
- Reduced the combined time spent on each partner application from days to minutes.
- Enabled partners to access the real-time status of each lead quickly and easily.

Client Testimonial



“Integrating Salesforce with CreditorWatch and DocuSign has really helped our operations run better, allowing us to manage credit reporting and document workflows with incredible efficiency. The self-serve Partner Portal that LendingLogik has developed for us has resulted in improving our partner relationships. It has reduced a lot of work load on our internal staff.”

Clement Dube

General Manager, Speedy Finance



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