

# Salesforce Transformation

## for a U.S.-Based FinTech Lending Company

 Finance & FinTech  Salesforce  US

### Executive Summary

Our client is a U.S.-based FinTech platform that helps small and mid-sized businesses secure flexible funding solutions. Through its network of 75+ lending partners, the company connects business owners with financing options such as SBA loans, term loans, and business lines of credit. To date, the platform has facilitated over \$1 billion in funding for small and medium sized businesses.



### Challenges

- ✔ **Underutilized Salesforce Investment:** Despite investing in multiple Salesforce cloud licenses, out-of-the-box Sales Cloud and Marketing Cloud capabilities were underutilized, limiting operational efficiency.
- ✔ **Inefficient Data Management:** High application volumes led to disorganized, duplicate data, hindering effective lead and opportunity management.
- ✔ **Operational Inefficiencies:** Customer and application information was spread across multiple systems, forcing employees to manually reconcile data before providing financing options to clients.
- ✔ **Disconnected Systems:** The Partner Portal was hosted externally while core CRM data resided in Salesforce, creating fragmented workflows and inefficient data synchronization between brokers, agents, and internal teams.
- ✔ **Limited Reporting Visibility:** Incomplete and inconsistent data capture led to inaccurate reports and dashboards, restricting leadership's ability to analyze pipeline performance, lender approvals, and revenue metrics.



## Business Value / Impact

A scalable Salesforce architecture was built to manage the full lending lifecycle—from lead capture to lender submission and commission tracking.

### Key components included:

**Sales Cloud:** Standardized management of Leads, Accounts, Contacts, and Opportunities.

**Pipeline Automation:** Configured stages, workflows, and forecasting.

**Marketing Cloud:** Automated email journeys and lead nurturing.

**Segmentation & Campaigns:** Targeted campaigns with tracking.

**Automated Lead Routing:** Intelligent assignment based on rotation and location.

**Custom Components:** Built tools like Opportunity Grid, Offer Calculator, and Commission Calculator.

**Verification Integrations:** Automated business, identity, and credit checks.

**Lender APIs:** Automated submissions with secure offer retrieval.

**Website Integration:** Real-time lead capture from website to Salesforce.

**Partner Community:** Migrated portal to Salesforce for secure partner access and tracking.

**The project was delivered using Agile methodology, with iterative releases and continuous stakeholder feedback.**



## Value We Offered

**The redesigned Salesforce ecosystem improved operations and sales performance:**

**25% higher adoption:** Better workflows boosted team and partner usage.

**20% higher conversions:** Faster routing improved borrower engagement.

**15% lower costs:** Automation reduced manual work and IT overhead.

**Revenue transparency:** Automated commissions improved financial visibility.

**Better insights:** Real-time dashboards enhanced pipeline and revenue tracking.



## Conclusion

- ✓ By redesigning the Salesforce architecture and integrating partner, lender, and verification systems, the organization successfully unified previously fragmented processes into a single platform.
- ✓ The new solution improved operational efficiency, enhanced data visibility, and accelerated customer conversion across the lending lifecycle.

