

Transforming Loan Origination

Salesforce Success Stories in Financial Services

Enterprise Solutions for Scale & Speed



Agenda

01

Hero FinCorp

Agentforce Automation for 80% Speed Improvement

02

Bike Bazaar

Salesforce Sales Cloud for Underbanked Markets

03

Revenue Cloud Advanced

Unified Lifecycle Management & AI Integration

Hero FinCorp: The Challenge

Manual Processes Created Bottlenecks

- 2-day average turnaround time
- 2 teams involved
- 6 workflows
- 100+ touchpoints
- 12-day backlog during peak season
- 75,000 daily requests during Diwali

Business Impact

- Slow dealer payouts discouraged recommendations
- Customer frustration during peak seasons
- Limited growth potential
- Operational stress on teams
- High error rates from manual processes

Hero FinCorp: Agentforce Solution

1

1. Application Upload

IDP converts document to
editable text

2

2. Data Validation

Auto-checks against records,
flags issues

3

3. Verification

API calls to government &
financial databases

4

4. Automation

Triggers e-signature,
uploads, disbursal

Hero FinCorp: Remarkable Results

Processing Time

2 Days



30 Minutes

96% Faster

Handoffs Reduction

Multiple



Zero Manual

75% Fewer

Form Errors

High



Minimal

37% Reduction

Peak Season Backlog

12 Days



None

100% Eliminated

Supports 11 Million Customers | Processes AA+ Rated Loan Every 30 Seconds

Bike Bazaar: Serving the Underbanked

A comprehensive two-wheeler lifecycle company serving metro, Tier 2/3/4 cities and villages across India with accessible financing solutions for new, electric, and pre-owned two/three-wheelers.

Market Focus



Challenge

- Rapid growth requiring scalable & flexible LOS
- Need for frequent product customizations
- Underbanked customers need personalized interactions
- Lack of transparent, easy-to-use system

Bike Bazaar: Salesforce Sales Cloud Solution



Mobile App Integration

Field agents capture data & documentation



KYC Automation

PAN, Aadhaar, driving license verification



Workflow Routing

Rules engine routes applications efficiently



Analytics & Insights

Data-driven decisions & market agility

Bike Bazaar: Results & Impact

2x

More cases managed

75%

Efficiency improvement

4x

Faster approvals
(20min→5min)

1 day

Product updates (from 6
weeks)

"With consolidated data and streamlined workflows on Salesforce, we have minimised response times and touchpoints."

— Sumanth Gangula, General Manager & Head of Credit, Bike Bazaar

Revenue Cloud Advanced: Enterprise Transform

Challenge: Fragmented Revenue Systems

- 1 Disconnected CPQ, billing, and contract systems creating data silos
- 2 Complex multi-model revenue streams (subscriptions, usage-based, IoT)
- 3 No mid-contract amendment capabilities without manual errors
- 4 Lack of consumption visibility and forecasting
- 5 ASC 606 compliance requires extensive manual journal entries
- 6 Post-sale fulfillment delays and customer satisfaction issues

Revenue Cloud Advanced: Comprehensive Sol

- Unified Revenue Platform replacing fragmented systems
- Advanced Pricing & Waterfall Management
- Native Contract Lifecycle Management (CLM)
- Dynamic Revenue Orchestration (DRO) for Post-Sale
- AI-Powered Quoting with Agentforce
- Comprehensive Subscription & Asset Management
- Advanced Consumption Management & Usage Billing
- Analytics Dashboards with Tableau Next

Revenue Cloud Advanced: Measurable Results

Revenue Recognition

Dramatic decrease in errors with automated ASC 606 compliance

Sales Productivity

Substantial increase through AI-powered quoting & guided selling

Revenue Recovery

Substantial recovery through consumption management & usage optimization

Fulfillment Speed

Major reduction in post-sale delays through DRO automation

Key Takeaways

📈 Agentforce automation delivers exponential speed improvements

📊 Scalable solutions support 2x workload increases

💰 Unified platforms recover substantial revenue

🎯 AI-powered workflows reduce manual touchpoints

✅ Compliance becomes automated, not manual

Transform Your Enterprise

with Salesforce Solutions
