

Issue

- Multiple legacy systems was not aligned in enterprise digital strategy
- Absence of a single integrated loan system
- Poor user experience hampering 360 degree customer view
- Lack of compliance check and manual processing
- Lack of auto-generated reports

Action

- Supported end-to-end user functionality
- Integrated real time and batch services
- Automated stage tracking
- Streamlined the process using approvals & validations
- Improved user experience

Impact

- Improved data quality
- Improved profitability
- Centralized CRM system
- Increased Revenue

- To build centralized CRM system which could replace the existing system
- Implemented solution on salesforce platform to enhanced user experience along with integrated 10-15 external system
- Saved salesforce license cost by using the platform license instead of salesforce license
- Client was able to engage more customer and were able to manage effectively
- Build UI in salesforce lightning for effective user experience
- Build interactive and real time record reordering just by drag and drop
- Real time document generation in excel and PDF
- Integrated multiple file system like CMOD and FileNet to reduce salesforce storage cost
- Enable real time customer authentication MDM system