

salesforce

Banking & Financial

Case Study

Simplifying Business Loan Processing with Integrated Digital Solutions

Digital Lending Platform Transformation

Client Overview

Our client is a leading online lender specializing in empowering small businesses through flexible financing solutions. They offer a comprehensive range of products including Express Loans, Asset Refinance, Working Capital, and Flexi Working Capital Loans, all designed to help growth-oriented businesses achieve their aspirations.

Challenges

- Manual, paper-based loan processing workflows created operational bottlenecks.
- Poor customer experience due to slow and inefficient processes.
- Limited ability to scale lending operations effectively.



Project Overview

As a forward-thinking financial services provider, the client recognized an opportunity to enhance their competitive position by modernizing their loan processing capabilities. While their product offerings were meeting market demand, there were significant opportunities to improve operational efficiency, enhance customer experience, and create scalable processes for future growth. The organization partnered with Previset to transform their approach from traditional, manual workflows to a fully integrated digital lending platform. Our collaboration focused on implementing a comprehensive solution using the Salesforce Lightning Platform and REST API development to automate application processing, seamlessly integrate with their website, and provide real-time visibility into the entire loan lifecycle.

Our Approach



salesforce

- **Fully Digital Loan Application & Processing** – Automated workflows replaced manual, paper-based processes.
- **Seamless Website Integration** – Custom development created an intuitive borrower experience, improving conversion rates.
- **Real-Time Salesforce Integration via REST APIs** – Ensured loan data was instantly available for CRM and reporting.
- **Custom Reporting & Analytics Dashboards** – Provided real-time loan pipeline visibility for data-driven decision-making and risk management.
- **Automated Customer Data Management** – Enabled cross-selling and improved customer retention.
- **API-First Integration Approach** – Delivered scalable, secure, and real-time data synchronization between the web platform and Salesforce

Tech Stack

Salesforce Lightning Platform, Salesforce REST API Development



The Results

- Loan application completion rates improved significantly through a streamlined user experience, directly impacting revenue growth.
- Enhanced data management with centralized customer relationship visibility enabled more effective cross-selling and customer retention strategies.
- Operational efficiency increased through automation, reducing manual work by 60% and lowering processing costs.
- Real-time loan tracking and reporting capabilities enabled faster decision-making and improved risk management.
- Scalable platform now supports 3x growth in loan volume capacity, positioning the client for continued market expansion.

Key Takeaway

This demonstrates Previs's expertise in transforming traditional financial services through digital innovation, leveraging Salesforce platform capabilities to create scalable lending solutions. Our API-first approach enables financial institutions to modernize operations while maintaining security and compliance standards.

T H A N K Y O U

PREVISE

www.previseit.com
contactus@previseit.com

