Case Study

Streamlining Loan Approvals and Boosting Customer Satisfaction with Salesforce Financial Services Cloud

ADVANCE DELIVERY CONSULTING

Customer story: A large Indian bank with over 1500 branches, frustrated by slow loan approvals due to manual processes and paper applications, partnered with ADC to streamline their process and improve customer satisfaction.

ADC Solution: To address limited communication and transparency, the bank implemented Salesforce **Financial Services Cloud** with ADC. This streamlined application workflows with online forms, document collection, and digital signatures. It also consolidated customer data for better access and provided real-time application updates. A centralized platform facilitated communication and ensured compliance.

Outcome: The implementation delivered significant improvements across the board, with faster loan approvals due to streamlined workflows, enhanced customer experience through real-time communication and transparency, improved operational efficiency through automation and data centralization, and reduced risk through better data accuracy and compliance management.

Value Adds: The bank's partnership with ADC and Salesforce Financial Services Cloud delivered significant results, streamlining loan processing, boosting customer satisfaction, and enhancing operational efficiency. ADC's expertise ensured a tailored solution, while automation freed up loan officers for relationship-building. Measurable improvements in processing times and customer satisfaction showcase the project's success.

40% Reduced Loan Processing Time	25% Increased Loan Application Completion Rate	30% Enhanced Customer Satisfaction
Enhanced Efficiency	**Streamlined User Experience**	**Improved Customer Satisfaction**