The Salesforce Customer Portal for Banking

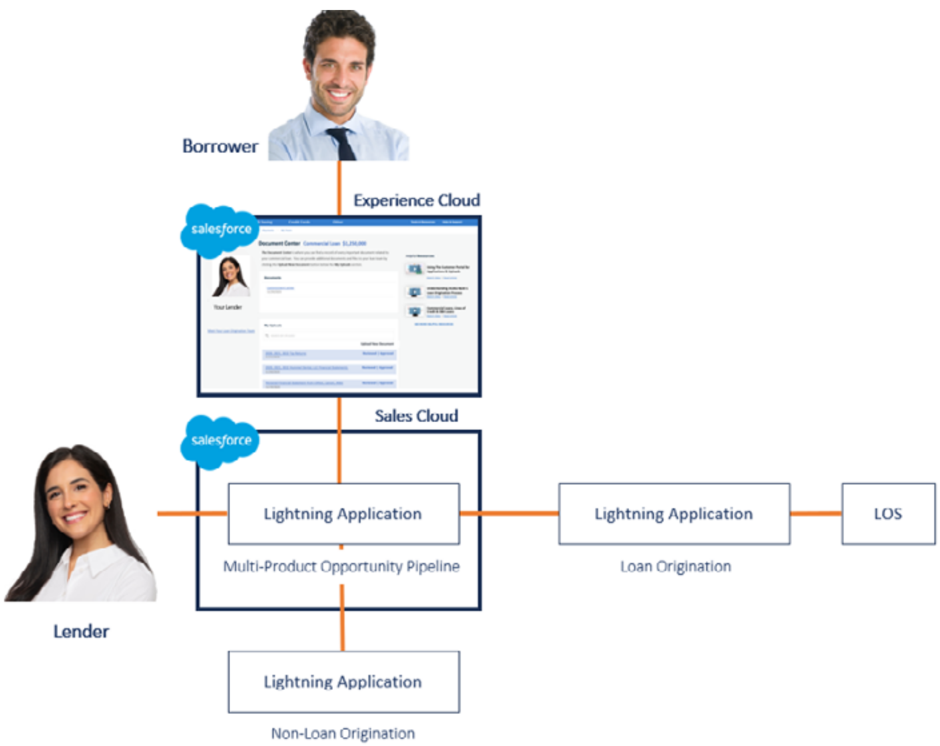
Finally, document collection that's simple, fast, and secure!

PERFORMANCE
INSIGHTS

Provide an Exceptional Lender & Borrower Experience

Your bank has many pipelines that are full of multiple product opportunities including loans, checking, savings, credit cards, cash management, and many others that require applications, beneficial ownership signatures, forms, compliance, and multiple financial documents.

Stop chasing your customers for documents and provide an exceptional lender & borrower experience with **The Salesforce Customer Portal for Banking**—a collaborative platform that helps to complete applications and gather all the required financial documents in a secure SOC 2 environment. Lenders, borrowers, and the back office can message and collaborate on applications, commitment letters, and closing documents. Documents and applications are securely stored in Salesforce and automatically entered into the correct loan origination system, non-loan origination workflows, or core processor.



Performance Insights' current clients are processing loan applications

34% faster

PERFORMANCE INSIGHTS

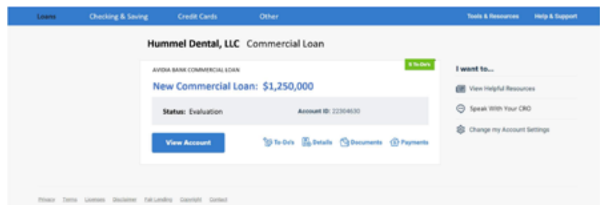
The Customer Portal is Very Easy to Use and Interactive

The salesperson and the customer may share and work on the same screen in the customer portal.

The customer may view instructions on a short video located in the customer portal. Most commonly, the customer will fill out the application, provide signatures, and submit financial documentation without any help. However, if the customer needs help, she may text the salesperson from the portal, or simply talk on the phone while they interact and work together on a shared screen in the customer portal. Each may use their desktop computer or a mobile device to access the customer portal. If document copies are not available, the customer may simply take a cell phone photo of the document and upload it directly to the customer portal.

Gather applications, documents, signatures, files and data in record time.

In a recent poll conducted by **Moody's Analytics**, the question was asked, 'What is your biggest challenge in initiating the loan process?', to which 66% of bankers surveyed answered the manual collection of applications, financial documents, and information and the subsequent back and forth with the loan applicant.



In the same survey, **Moody's Analytics** asked, 'what percentage of your sales cycle do you spend waiting for an applicant's financial documents and information?', to which bankers answered 30% to 50%. This means that up to 40% of the sales cycle is waiting on a frustrated customer to provide financial documents.

Cut turnaround times on applications and financial document collection by up to

80%

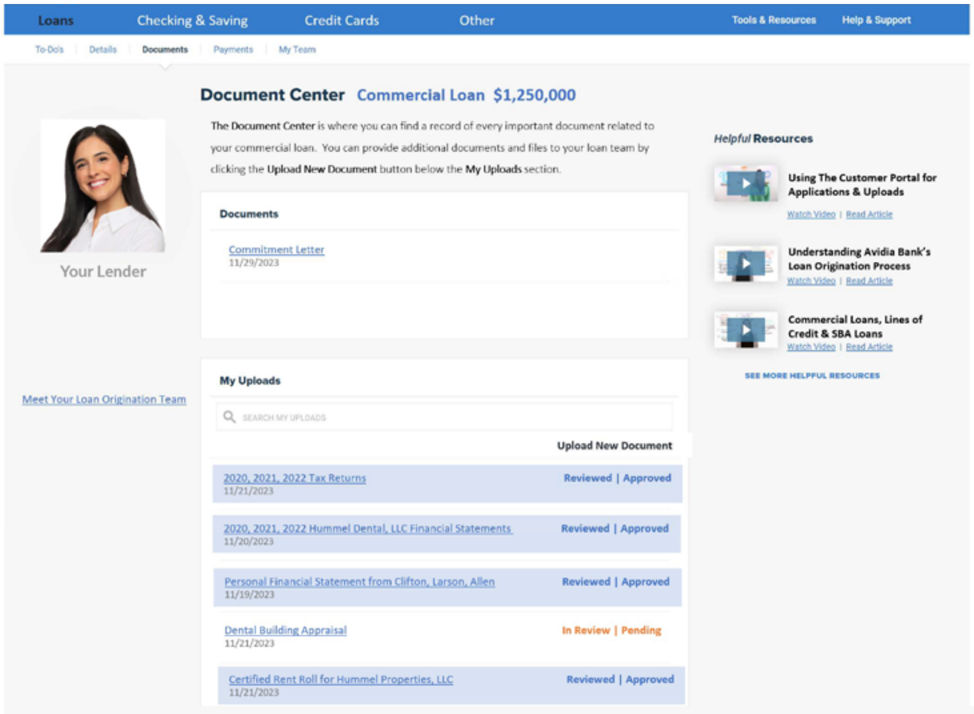
PERFORMANCE INSIGHTS

Scale Your Operations with Efficient Processes

Today's highest performing banks are automating the collection and management of client applications, financial documents, signatures, and information to provide an improved borrower and lender experience.

With the Salesforce Customer Portal for Banking, you can:

- Improve lender engagement and save them time for more productive tasks.
- Shorten sales cycles by 25% and improve sales velocity by 40%.
- Provide examiners with a more compliant (and faster) audit trail for reviews.



Shorten sales cycles by

25%

Improve sales velocity by

40%

PERFORMANCE INSIGHTS

Provide the Digital Experience Your Clients Expect

Smart Notifications

Set due dates for document requests and let the customer portal do the reminding and follow-up. Review, approve or reject applications and documents and let a smart follow-up algorithm chase clients for you.

Configurable Just For Your Needs

The Customer Portal is quickly configurable to meet your unique needs. The Customer Portal uses modern Lightning Applications that are like customizable building blocks. This user-first approach is fast and affordable for large and small banks.

Encrypted Client Data (PII)

Stay compliant with client interactions, messages, files and access. No more digging through emails to provide records to auditors.

API & Integrations

The Customer Portal integrates with the sales stack using a set of innovative Lightning Applications – Multi-Product Pipelines, Loan Origination, and Non-Loan Origination. These Lightning Applications are configurable building blocks that integrate with all core processors, all popular loan origination systems (LOS), various storage systems (Google Drive, One Drive, Drop Box, Box), document management systems (like Medici, CSi), and over thirty other popular banking systems that may be in your sales stack.

Call us today for a quote:
480-212-6082