

# Transforming Fintech Operations with Salesforce Solutions



**Client:** Global Fintech Company Specializing in SME Lending



**30% Sales Team Efficiency Boost:** Streamlined Sales Cloud processes increased productivity by 30%.



**50% Quicker Customer Responses:** Enhanced Service with 50% faster loan request responses.



**60% Faster Deployments:** CI/CD and Delta packages reduced deployment time by 60%.

# Addressing Pain Points: Streamlining Operations for Growth

**The Challenge:** As a leading provider of loans to SMEs across multiple countries, our client faced significant operational challenges:



## Inefficient Deployment Processes

Slow and inefficient deployment processes limited scalability.



## Manual Workflows

Manual workflows caused bottlenecks, hindering effective client service.



## Outdated Salesforce Tools

The existing Salesforce tools urgently needed modernization.



## Disconnected Systems

Disparate systems required seamless integration across workflows.



## Pandemic-Induced Changes

The COVID-19 pandemic necessitated urgent updates for government-defined loans.



## Costly Loan Management

Managing rejected loans with non-Salesforce tools was expensive.



## Need for Virtual Assistance

There was a clear demand for a virtual assistant to enhance client interaction.



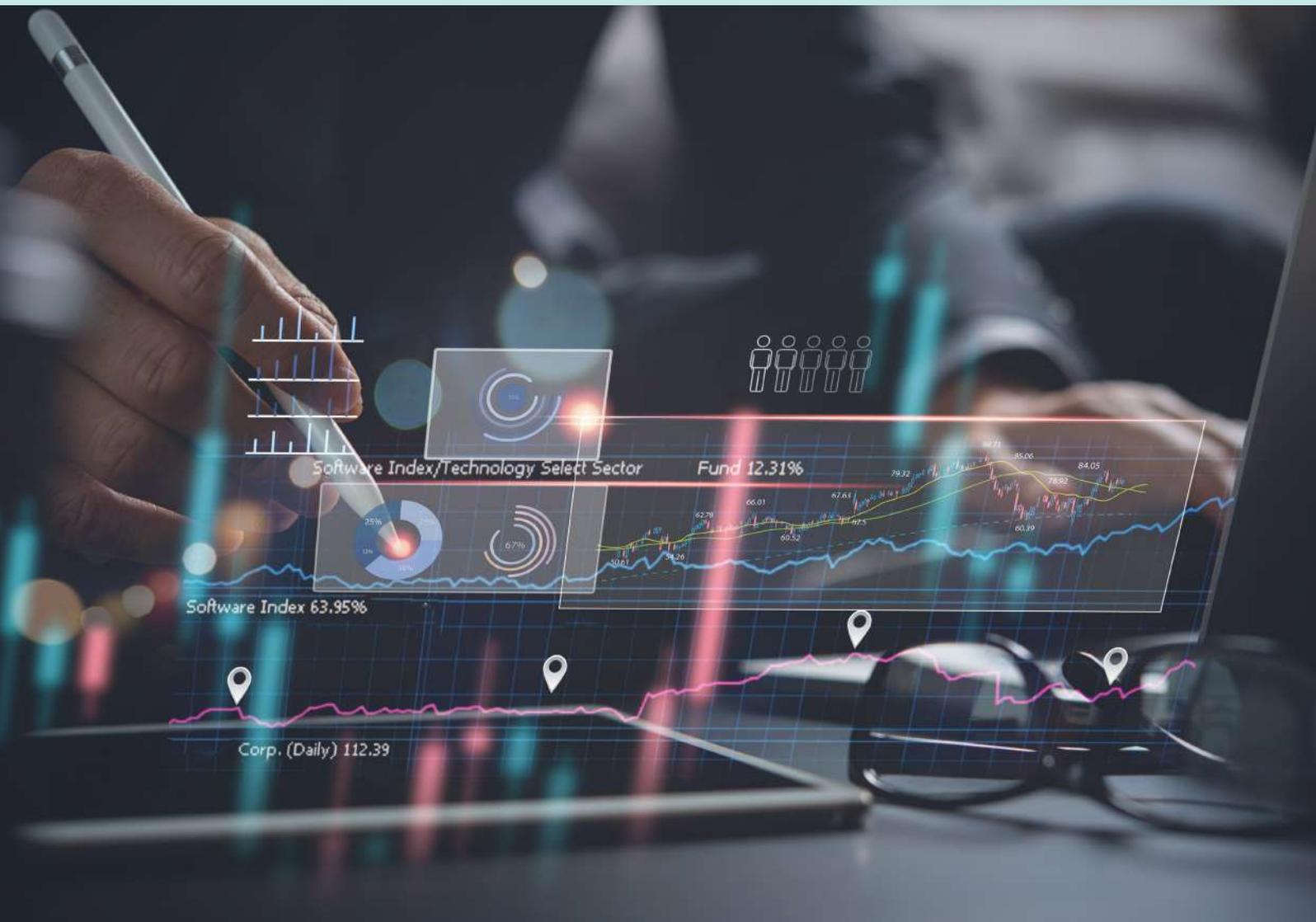
## Collaboration Platform

There was a need for a common platform for retail investors and business SMEs to collaborate and streamline the loan process.

# Crafting the Solution: Optimizing Salesforce with AppExchange

**Our Approach:** We partnered closely with our client to streamline and automate their loan process. This resulted in improved lead management, faster customer response times, and a 60% reduction in deployment efforts, boosting efficiency and customer satisfaction

- **Customer Communications and Telephony Integration:** Simplified customer-facing communications and integrated telephony using AppExchange solutions.
- **Custom Workflows Development:** Utilized Salesforce APIs to develop new custom workflows and integrate with third-party applications like DocuSign and Conga.
- **Efficient Deployment Processes:** Improved DevOps with CI/CD processes using Drone CI for efficient deployment management.
- **Delta Package Deployments:** Leveraged Delta package deployments to minimize downtime and ensure smooth updates.
- **Enhanced Reporting Capabilities:** Enabled reporting to forecast loan volumes, monitor individual and team performance, and inform training decisions.



# Achieving Business Outcomes: Driving Growth and Efficiency

**The Results:** Our collaboration delivered transformative results for the client:



## Faster Deployments

60% increase in deployment speed with CI/CD and Delta packages, optimizing efficiency and reducing downtime.



## Increased Sales Productivity

Streamlined Sales Cloud processes resulted in a 30% increase in sales team productivity, facilitating customer engagement and easier qualification, segmentation, and closure of leads via web and email.



## Improved Response Times

Enhanced capabilities led to a 50% improvement in response times to loan requests, significantly boosting customer satisfaction and loyalty.



## Operational Efficiencies and Cost Reductions

Automated identity verification, document generation, SMS campaigns, and loan rejection notifications within Salesforce resulted in substantial cost reductions and operational efficiencies.



## Lead Generation

Sales Cloud enabled lead generation from diverse sources, expanding potential customer reach.

# Partnering for Success

Our partnership embodies a commitment to overcoming challenges and fostering sustainable growth in fintech. By leveraging advanced technology and strategic implementations, we've equipped our client to navigate future challenges with confidence, agility, and innovation.



## About Altimetrik

Altimetrik is a pure-play digital business services company. We focus on delivering business outcomes with an agile, product-oriented approach. Our digital business methodology provides a blueprint to manage data and develop, scale, and launch new products to market faster. Our team of 6,000+ practitioners with software, data, cloud engineering skills help create a culture of innovation and agility that optimizes team performance, modernizes technology, and builds new business models. As a strategic partner and catalyst, Altimetrik quickly delivers results without disruption to the business.