



Salesforce For the Mortgage Industry

Client Profile

Our client is a fast-growing mortgage services provider based in the United States, offering various financing solutions. With a focus on customer experience, the company caters to bridging loans, semi-commercial mortgages and finance development.



Current Landscape

Before partnering with us, the client worked on manual processes for lead management, client communications, and payment tracking.



Project Background

Our client, a prominent mortgage services provider in the United States, faced challenges with their existing customer relationship management (CRM) system. The system was outdated, leading to inefficiencies in managing customer data, processing payments, and executing marketing campaigns. To overcome these challenges and enhance their operations, the client implemented Salesforce solutions.



Region

England, UK



Industry We Served

Mortgage



Technology We Used





Challenges Faced by Our Client

➤ Payment Systems:

The client handled the payment confirmations externally, and agents had no record in Salesforce.

➤ Manual Work:

The client worked on the manual work for lead management, which decreased their sales.

➤ **Delayed Email Campaigns:**

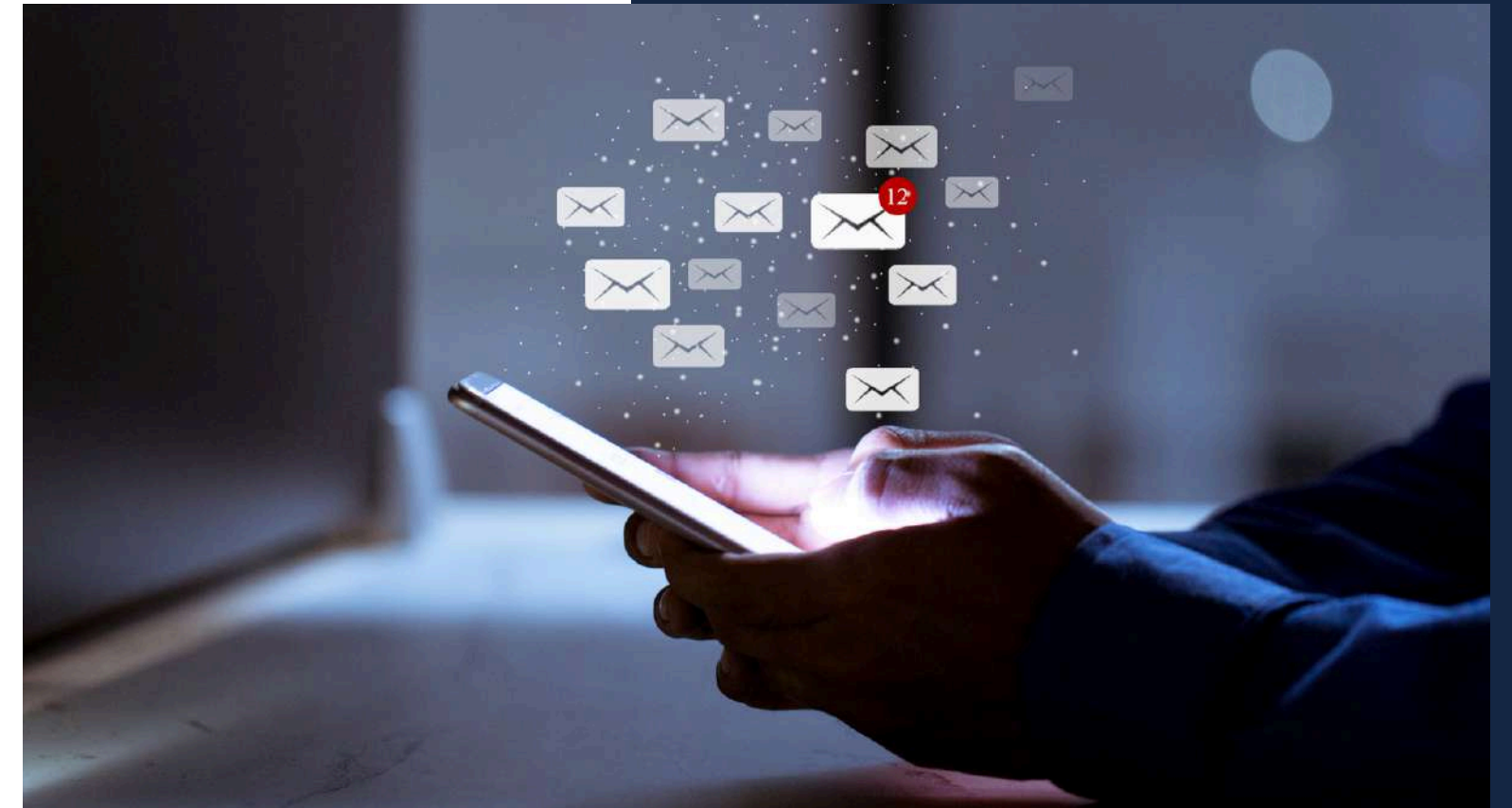
The marketing team manually created and sent campaign emails without automation or personalization.

➤ **Limited UI Usability:**

Their existing Salesforce interface was difficult for agents to use, leading to low adoption.

➤ **Recurring Email Follow-ups:**

The client manually sends reminders for documentation and status updates, leading to increased errors.



Solution Proposed

To address the identified challenges, we implemented the following Salesforce solutions:

- **Payment Gateway Integration**
- **Salesforce Sales Cloud Implementation**
- **Salesforce Lightning Components Implementation**
- **Salesforce Marketing Cloud**

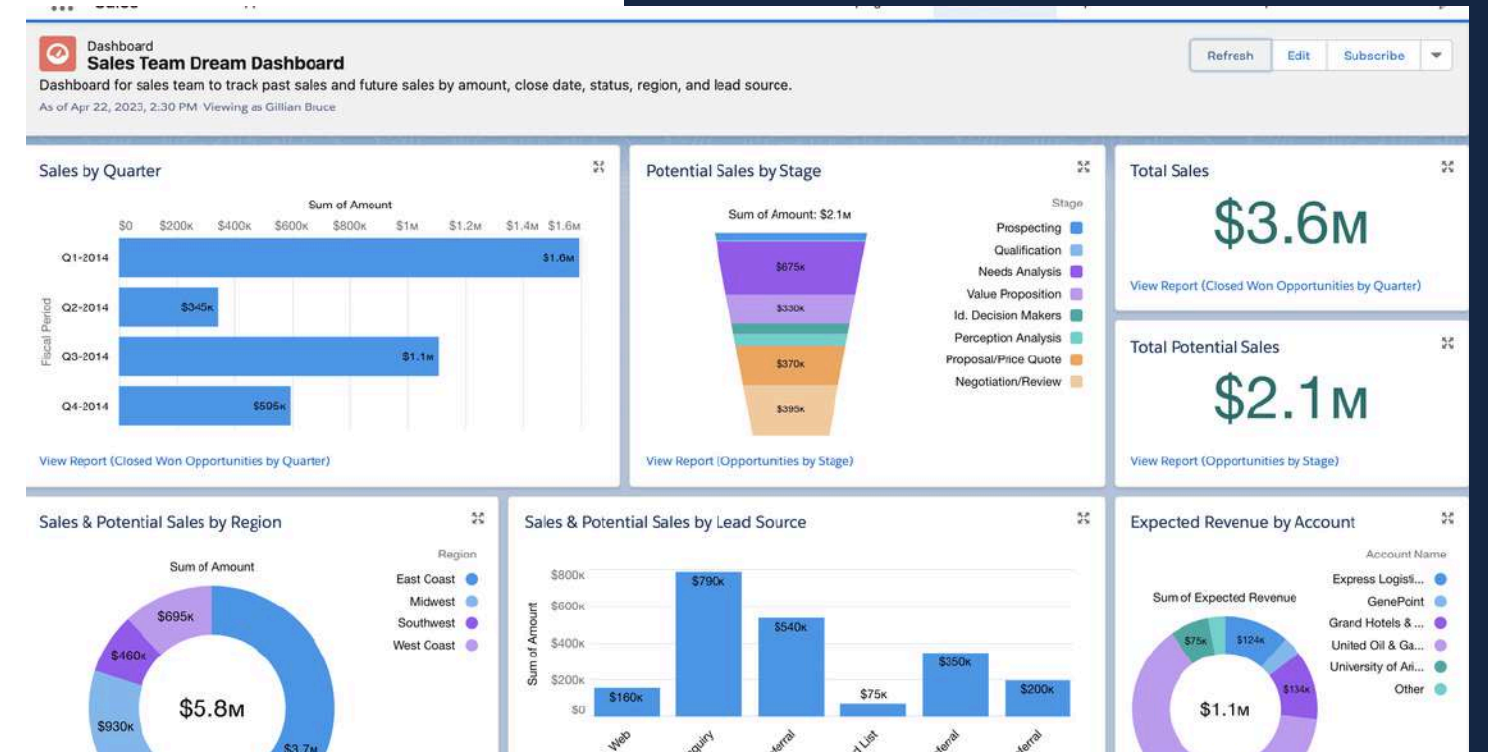
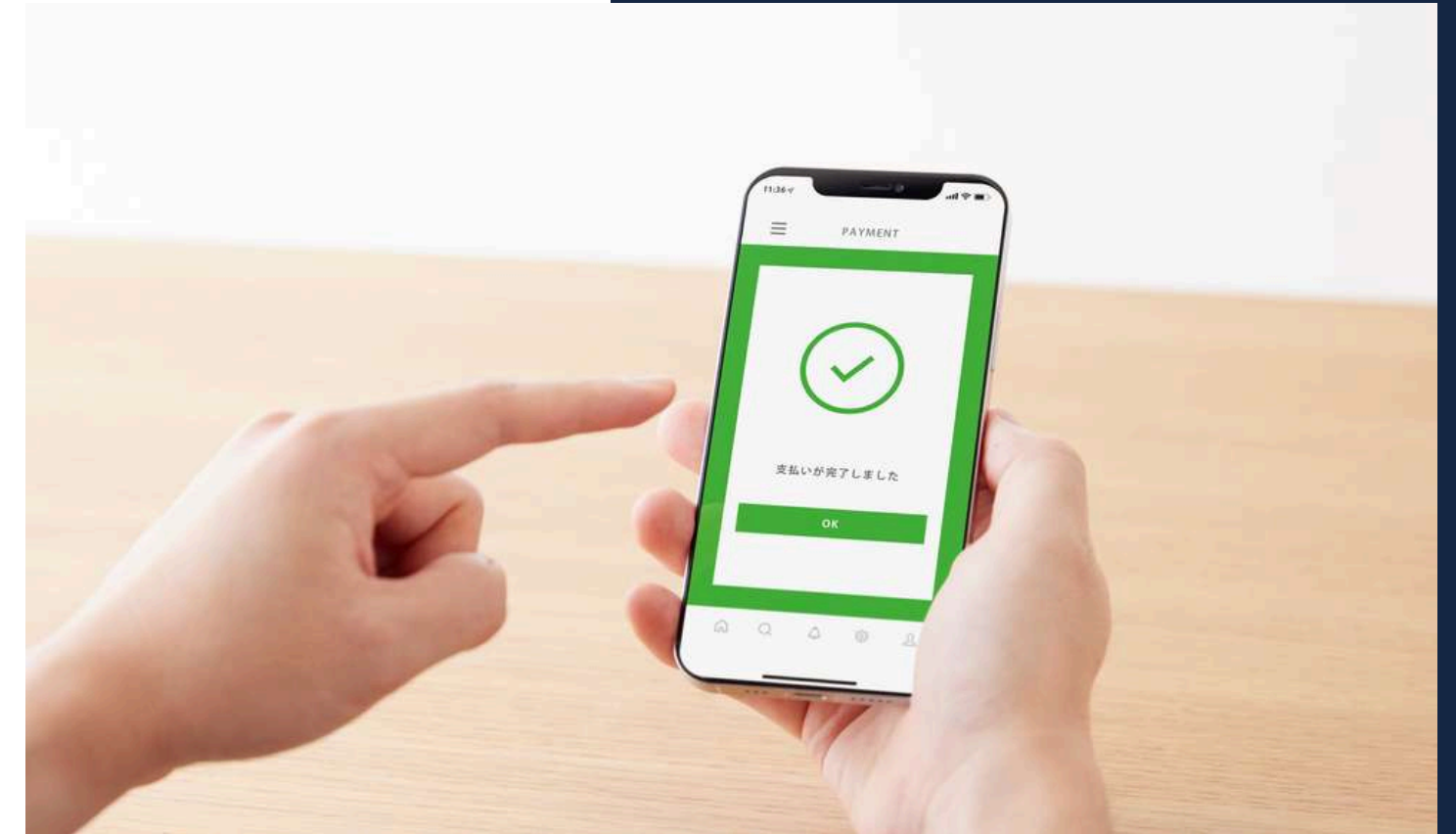


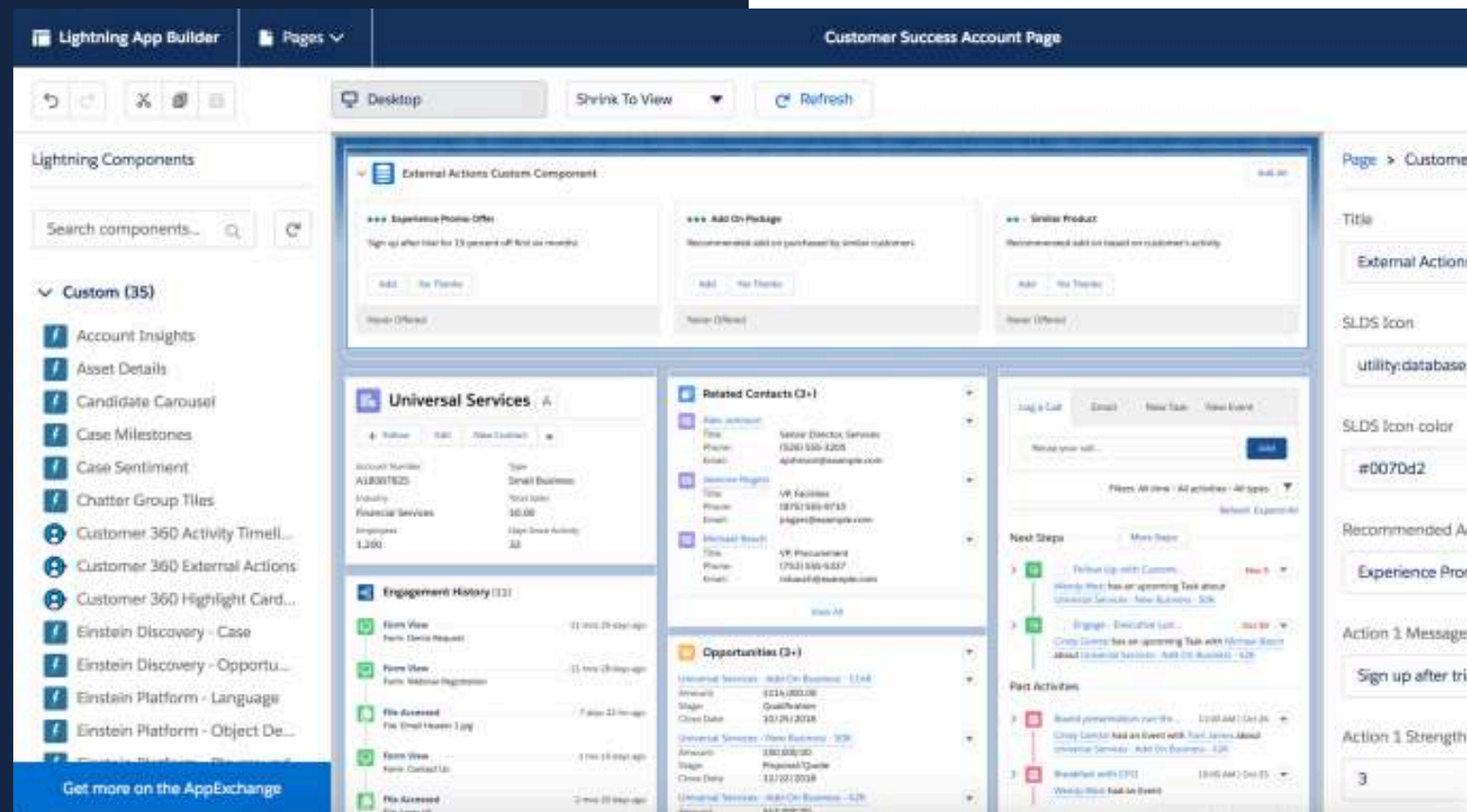
➤ Payment Gateway Integration

We have integrated Salesforce with the Stripe system, enabling real-time tracking of payments and automatic updates to customer records. This integration ensured two-way payment for immediate notifications upon payment completion or sent payment reminders using custom logic for enhancing transparency and communication.

➤ Salesforce Sales Cloud Implementation

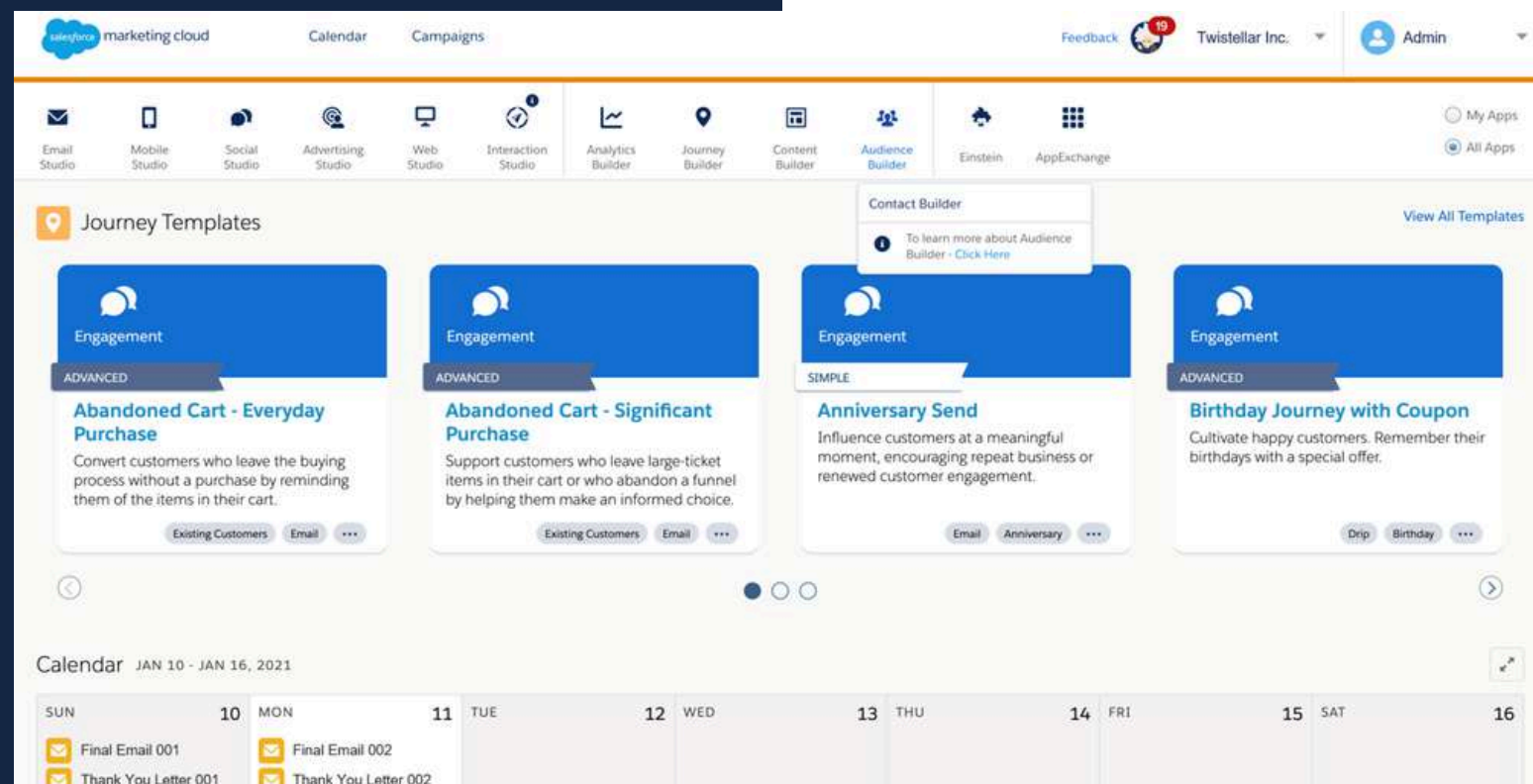
We have implemented customized Sales Cloud to simplify lead capture, nurturing, and conversion processes. Automated workflows were established to assign leads to appropriate agents based on predefined criteria, improving response times and conversion rates. Also, we worked on contact management, accounts, and opportunities management to provide a comprehensive view of your sales pipeline and improve sales strategies.





➤ Salesforce Lightning Components Implementation

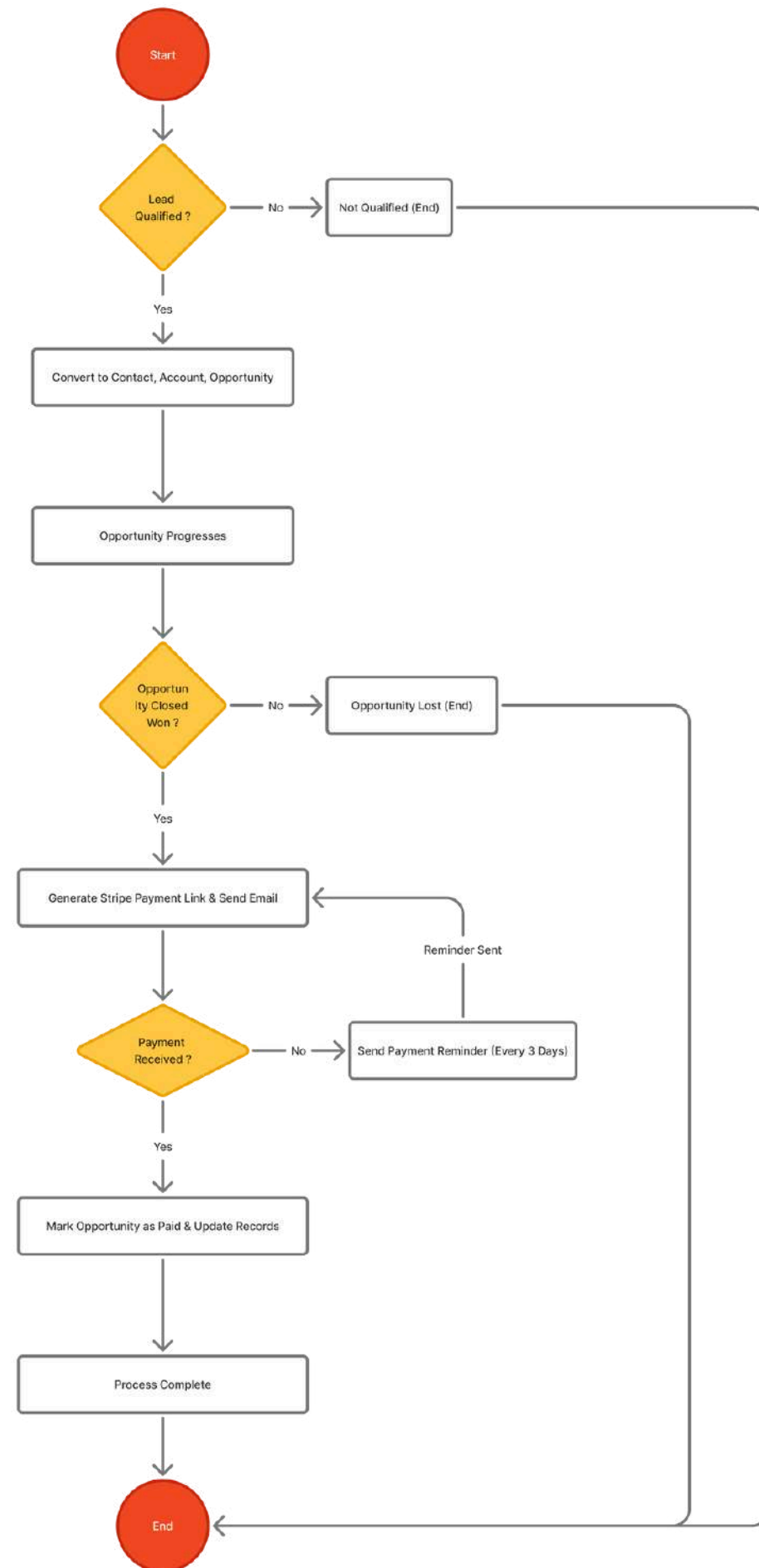
We have developed and deployed Lightning Components to make the Salesforce user interface, focusing on enhancing usability and accessibility. The new interface featured customizable dashboards, intuitive navigation, and responsive design, leading to increased user adoption and productivity.



➤ Salesforce Marketing Cloud

We have designed and launched automated email marketing campaigns targeting various customer segments through Salesforce Marketing Cloud. These campaigns included personalized content based on customer behaviour and preferences, leading to higher engagement and conversion rates.

FLOW CHART





Results

➤ Reduction in Manual Follow-Ups

Implementing automated recurring emails has significantly reduced the need for manual follow-ups, leading to a decrease in manual work. This reduction not only saves valuable time but also enhances operational efficiency.

➤ Improved Payment Processing

With the integration of Stripe, there is a reduction in payment processing time, with real-time updates ensuring accuracy and timeliness in payment tracking.



➤ **Enhanced Marketing Efficiency**

Automated campaigns increased customer engagement rates, with personalized content leading to higher open and click-through rates.



➤ **Increased User Adoption**

The redesigned user interface and mobile accessibility features improve productivity and satisfaction.



Performance Improvements



80%

Reduction in Manual Work



90%

Improved Payment Processing



90%

Increased in customer engagement



85%

Increase in user adoption





About CRM Masters Infotech

ENABLING GROWTH THROUGH
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We are a CRM consultant company focusing on Shopify eCommerce solutions. With over **8+ years of experience** and over **2050+ successful projects**, we have a proven track record of helping businesses optimize their workflows and boost growth. Our team of **100+ expert developers** specializes in delivering top-notch eCommerce platforms, CRM integrations, and tailored business solutions to meet our client's needs.

LET'S TALK & FIND YOUR SOLUTION



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