

## Moving Underwriting Team Leads to Efficiency and Communication Gains

**Company's name:**



**Company Slogan:**

Long Term Mutually Beneficial Relationships.

**Overview:**

How a leading lender in financial services modernized its underwriting processes and streamlined its Salesforce implementation.

**The challenge:**

Bringing the Underwriting Team Out of the Silo.

**Services Performed:**

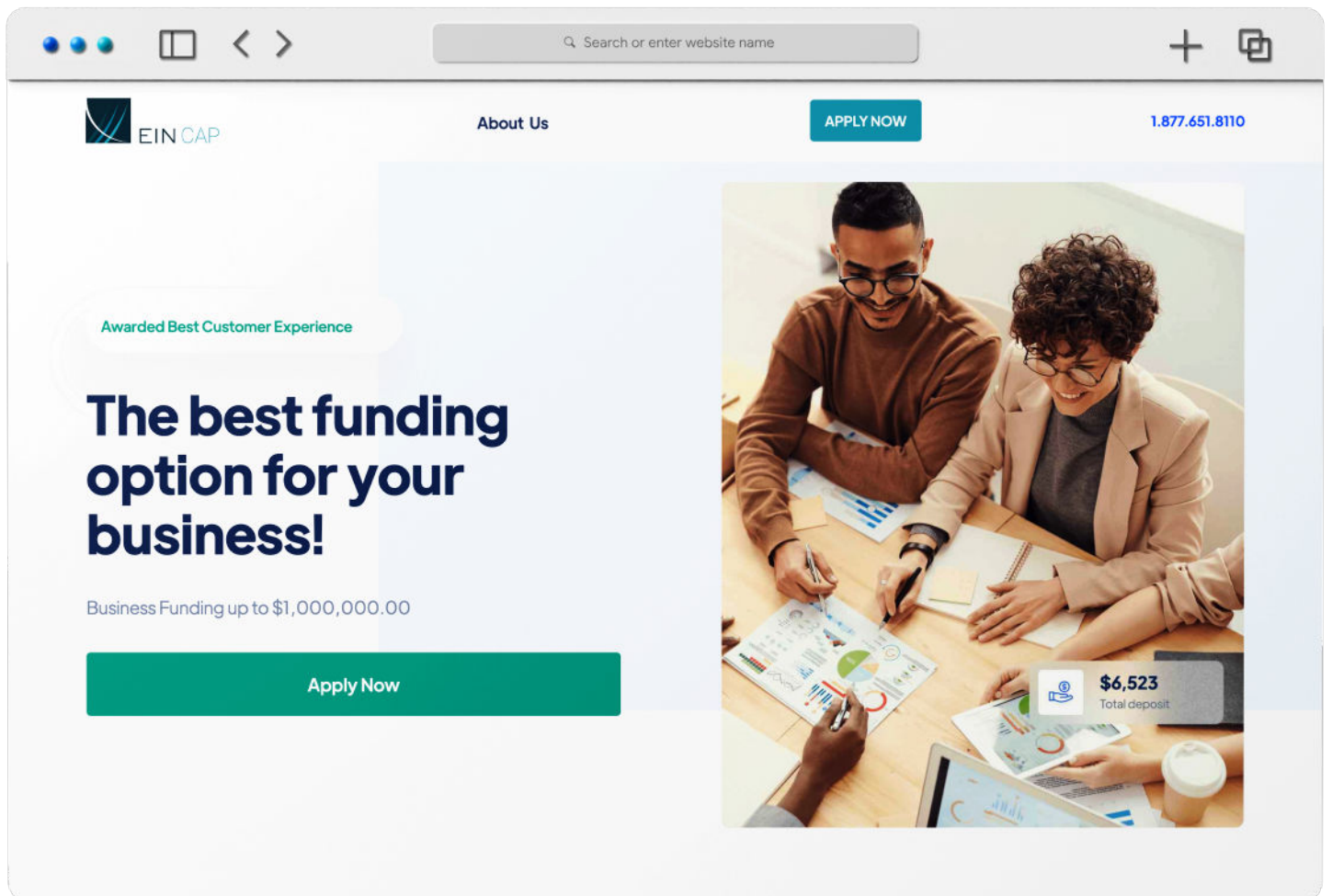
- Salesforce Enhancement
- Salesforce Integration

**Results:**

Immediate adoption, company - wide benefits.

## About EIN Capital

Trusted by over 10,000 businesses, EIN Capital is a leading small business lender in the financial services vertical. The company provides investment, capital, and consulting to help businesses and entrepreneurs grow and thrive in competitive marketplaces. The company needed to move a key department onto the Salesforce platform to streamline interdepartmental communication and make deal processing more efficient.



## 1. The Challenge

### Bringing the Underwriting Team Out of the Silo.

Although the rest of the company was already using Salesforce on a day today basis, the underwriting team at EIN Capital was still using dated systems to secure funding and process deals. Because the underwriting team weren't tracking processes around offers to merchants and cash flow information in Salesforce, instead keeping information in various emails and Excel spreadsheets, other teams such as sales and services lacked visibility into the most up-to-date customer information.

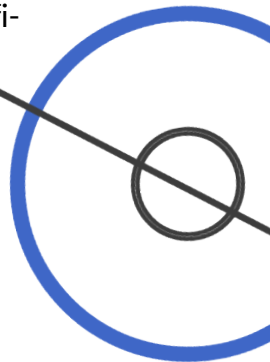
Having used these outdated processes for over a decade, the underwriting team was reluctant to move to a new system. Still, the company knew it needed to move the underwriting team to Salesforce if it hoped to scale operations to keep pace with growth.

## 2. The Solution

### Key Underwriting Processes Made More Efficient Inside Salesforce.

Part of the reason for this reluctance was the worry that underwriting processes in place for a decade would change, become less efficient, or require time-intensive retraining.

The solution was to mimic underwriting processes and functions, such as entering calculations and updating customer records, all using a clean and simple user interface built straight onto opportunity records within Salesforce. All of the underwriting was now plugged into the rest of company processes, with calculations refreshed automatically, giving the entire company new insights to previously siloed trends and helping inform future underwriting decisions.



## 3. The Results

### Immediate adoption, company – wide benefits

Key stakeholders on the EIN Capital team worked closely with the Cloud-Square implementation team to make sure no detail went overlooked. As a result, all of the underwriting team's existing processes, data, and records were successfully integrated into the Salesforce platform. The benefits were immediate, and extended beyond just the underwriting team:

- ✓ 100% user adoption after successfully onboarding entire underwriting staff.
- ✓ Improved monthly processing speed versus the old manual system.
- ✓ 15% increase in deals closed/won.
- ✓ Addition of 12 users since implementation.



- ✓ Streamlined Communication, updated Customer Insights for the entire company.
- ✓ With all communication now in Salesforce, the underwriting team was able to capture all their information in a single customer record available to every department in the company.
- ✓ Immediate boon to interdepartmental communication and cooperation.

## Ready to transform the way your company uses Salesforce?

Contact us today to take the first step toward powerful automations that increase productivity and maximize ROI.

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