

SME Lending Journey on Salesforce FSC

Coforge, with its deep expertise in delivering niche technology solutions for the banking and financial services industry, has spearheaded the creation of this SME lending solution. We've drawn from our extensive BFS knowledge and Salesforce FSC proficiency to develop this IP, making the most of our group's investments in AI and automation.

Our mission - To help you realise the full potential of your Salesforce investment by getting fuller use from your CRM.

In an environment where banking products and services have saturated the market, it is becoming increasingly difficult for Technology and Transformation leaders in Banks to know which products to choose, and how to optimise value for money. Across our BFS client base within Coforge, we are hearing some common questions being asked by the Technology and Transformation leaders we support.

Addressing the Problem

Cost to serve

How do I get more bang for my buck across my existing products & infrastructure. If I pay for expensive licenses, how do I optimise the value I get?

Flexibility & Fungibility

How do I ensure I am leveraging the best tools for the job across my eco-system, in a way that removes reliance on a single product. I want to be able to plug and unplug individual capabilities, as and when I need them.

Transformation at pace

How do I evolve rapidly and keep pace with the changing market and technology trends, how do I avoid implementing technologies, only to find I am back out for RFP the moment it is done.

Introducing a valuable approach: We have leveraged the capabilities of Salesforce to develop a distinct offering - SME lending on Salesforce FSC. The approach delivers significant benefits to financial institutions involved in SME lending and have already invested, or planning to invest in Salesforce FSC.

Key facets of the solution

Einstein AI assisted decision making

Built by leveraging FSC Data model

Crafted using our deep BFS domain knowledge

Dynamic data capture framework

Automated information extraction through IDR

Seamless integration for credit risk and financial spreading

Business process automation using flows and approvals

Scalable for multiple lending products

The screenshot displays a Salesforce CRM record for an Opportunity named 'SME Lending'. The record is owned by Rob Lofero and is set to close on 11/8/2023. The interface includes several tabs: 'Basic Details', 'Financial Check', and 'Examining and affirming'. The 'Basic Details' tab is active, showing fields for Business Name, Business Activity, Business Registration Number, and Registered Address. A 'Document Verification' section is expanded, showing 'ID Verified' as checked, 'Annual Income' as \$75,000, and 'Received Documents' as 'Driving License; Business Sheet; Business Statement; Pass'. A 'Credit Risk Details' section is also expanded, showing 'Credit Risk Score' as 700, 'Business Failure' as 1,479, and 'Risk Decision' as 11/8/2023. A 'Financial Spreading - Moody's Business Health Report' section is expanded, showing 'Debt/Worth Ratio' as 2.00, 'Quick ratio' as 1.20, and 'Debt Ratio' as 1.30. An 'Einstein Prediction' box is overlaid on the report, indicating a 'Predicted At Risk' status with a 'Green' rating.

What Coforge brings to the table

- ☑ In-depth BFS domain knowledge, specifically in Lending.
- ☑ Profound technical expertise in Salesforce FSC implementations and solutioning.
- ☑ Proven experience in supporting CIOs maximise the ROI on Salesforce Investments.
- ☑ Capability-driven design approach that places user experience at the forefront.
- ☑ Extensive experience in implementing and integrating niche financial services capabilities.

For a detailed solution demo write to us
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About Coforge

Coforge is a global digital services and solutions provider, that enables its clients to transform at the intersect of domain expertise and emerging technologies to achieve real-world business impact. A focus on very select industries, a detailed understanding of the underlying processes of those industries and partnerships with leading platforms provides us a distinct perspective. Coforge leads with its product engineering approach and leverages Cloud, Data, Integration and Automation technologies to transform client businesses into intelligent, high growth enterprises. Coforge's proprietary platforms power critical business processes across its core verticals. The firm has a presence in 21 countries with 25 delivery centers across nine countries.

Coforge is a **Salesforce Summit Partner & MuleSoft Strategic Partner.**

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