

A Leading Community Bank Transforms Lead Management for Commercial Lending with Newgen

Project Background

The Tennessee-based community bank has 28 branch offices and offers customized personal and business banking services.

The bank was managing and tracking leads manually, resulting in inefficient, time-consuming processes and opportunity leakage.

Roadblocks Faced by the Bank

- Manual tracking and management of leads
- Absence of a lead qualification system
- No database to reference and identify returning prospects
- Manual assignment of leads
- Opportunity leakage
- Time-consuming manual entry of information into the loan origination system



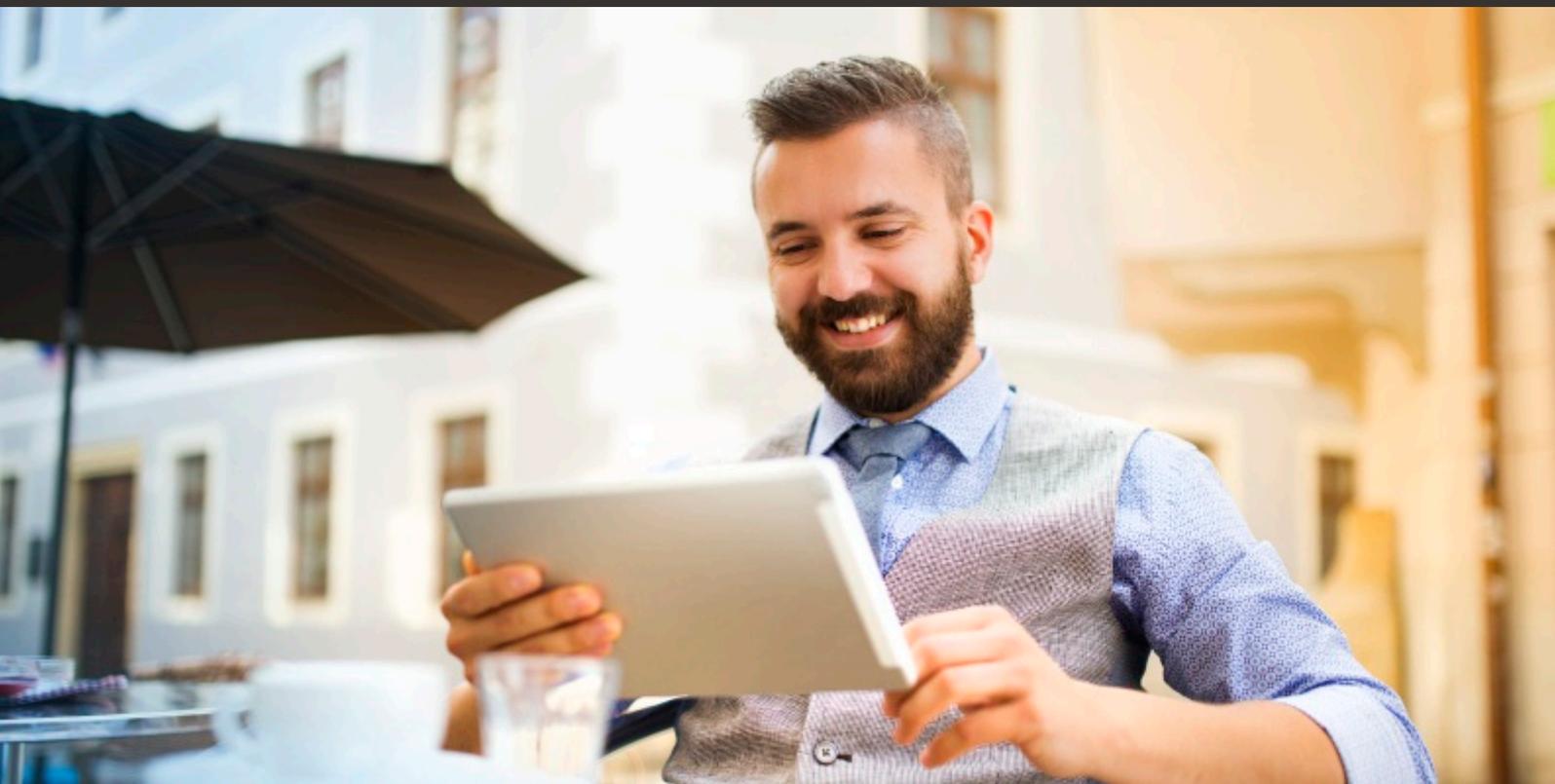
Bank's Requirements



Streamlined Lead Management with Newgen

By deploying Newgen's **sales force automation framework**, built on our digital transformation platform, the bank was able to adopt a systematic approach to creating, managing, and nurturing their leads and opportunities. The solution enabled their end-to-end customer journey, from lead management to account creation.

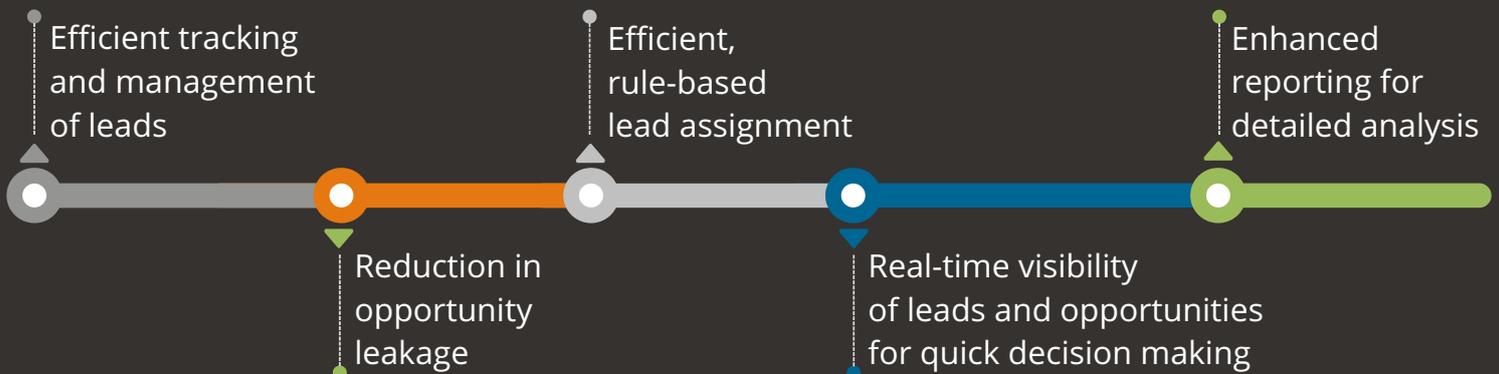
The solution provided their loan officers with a complete view of open leads and opportunities. They were able to identify duplicate and neglected leads, and detect any missing information or documents, before moving on to the next opportunity. The bank also gained access to real-time alerts, notifications, a calendar view of appointments and reminders, and updates across various branches. Comprehensive dashboards, used to track and manage the sales pipeline, open and neglected leads, and other activities, provided better visibility to their loan officers and top management.



Key Highlights

- Multi-channel lead capture
- Bulk upload of leads
- Lead scoring and prioritization
- Automated lead assignment based on zip code mapping
- Tagging of leads to existing accounts
- Outlook integration for appointments
- Focused approach to increase the conversion rate of new businesses
- Ability to highlight neglected leads and opportunities
- Simplified view of customers for information-backed sales efforts
- Role-based dashboards
- Seamless integration with the onboarding system to avoid any rework on data or documents

Key Benefits Achieved



About Newgen

Newgen is a leading provider of low code digital automation platform. Globally, successful financial institutions, insurance, government, and shared services organizations rely on Newgen's industry-recognized products and applications-to manage their processes (BPM), content (ECM), and communications (CCM)-for connected operations. From customer onboarding to service requests, from loans and deposits to underwriting, and many more, Newgen's industry applications transform business-critical operations with agility. Newgen's cloud-based platform enables digital transformation initiatives for superior customer experience, optimized costs, and improved efficiencies. For more details, visit www.newgensoft.com

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