

# Leading NBFC “Ambit Fininvest” Redefines Its Field Sales and Loan Origination Operations With Custom Salesforce CRM Solution



## The Client Profile

Ambit Fininvest Pvt. Ltd. is the systemically important Non-Banking Financial Company (NBFC) of Ambit Group. As on October 2022, they have helped 14,000+ clients across Institutions, Corporates, High Networth Individuals, and Self-employed individuals in realizing the true potential of their businesses and achieving their goals.

## The Need for Automating Field Sales Operations in a NBFC

Fast evolving regulatory requirements and stringent laws with increased competition to serve the new-to-credit segment have made it necessary for NBFCs to sharpen their business agility. And with customers preferring faster service, more transparency, and responsive interactions, providing a great digital-led seamless and consistent customer experience (CX) is no longer a luxury but a necessity for all financial services firms including NBFCs. They are thus now moving away from paper-and excel-based slow legacy systems to build more simplified, efficient, and customer-centric systems to increase their sales revenue while nurturing customer relationships.

## Challenges of Ambit Fininvest

Ambit Fininvest faced a similar challenge of a lengthy field sales journey from loan request to disbursal with its physical form-driven manual sales processes. Their data reporting was prone to frequent errors and in the absence of a central repository for reports, Sales team had to process these data to a collated actionable insight manually. They wanted help in transforming manual and time-consuming field sales operational activities through a digitally accelerated, accurate, and user-friendly system.

## CHALLENGES



Slow Physical  
Forms-based  
Sales Journey



Erroneous Sales  
Data Reporting



Time Consuming  
Loan Disbursement  
Process



Less Efficient and  
Inaccurate Sales  
Operations

## The Solution

**Mobile-Ready Solution to enable simple and accurate data entry process to loan origination system (LOS)**

We replaced the use of physical forms for data entry to the loan origination system (LOS) with a digitized process where the field sales team would use a scalable mobile-ready solution with strong validations improving the data accuracy. This customized setup enabled the entire sales system to track the status of their loan files in real-time and manage their work efficiently.

**Implemented Custom Salesforce Sales cloud CRM for an efficient end-to-end Sales Journey**

We implemented a custom Salesforce CRM solution using Sales Cloud licenses to help the sales team at Ambit Finvest access and manage their entire sales journey digitally any time – from loan requests to loan disbursement and the post-sanction process. This UX-based, easy-to-use, mobile-ready solution integrates their lead/applicant management processes to existing LOS, which enables the sales team to access the required intelligence instantly. It would reduce efforts needed for document collection and validation, help track the status of the loans in real-time, improve the performance of multiple sales representatives, and manage their productivity easily. We also integrated the application with multiple financial touchpoints, including CIBIL, KYC, LOS, Credit Ratings, etc., to make it a single source of truth for the sales team at Ambit Finvest.



# Value Delivered - Redefined UI Experience & Improved Business Results

With the implementation of a custom, mobile-ready Salesforce solution, Ambit Finvest realized the following changes:



## Reduced lending TAT

Requesting a fresh loan till Go/No-Go decision is reduced by several days to a few minutes.



## Enhanced customer satisfaction at lower cost-to-serve

The time taken for requesting a loan to disbursement has reduced for Ambit which has become a major driver to increase customer satisfaction.



## Improved Process Efficiency

Efforts required for document collection and KYC/legal checks are reduced by more than 70% with the introduction of mobile-compatible solutions for professionals.



## Satisfied Sales Team

- ▶ Internal matrix and Direct Selling Agent (DSA) satisfaction are up by more than 75% due to better visibility and real-time loan tracking status.
- ▶ Real-time TAT evaluation helped improve employees' efficiency by almost 100%.

**Learn How You Can Automate Your Sales Operations with Custom Salesforce Solution**

[Request Free Consultation](#)

## About Damco

Damco Solutions is a strategic Salesforce partner and holds consulting and technology expertise across the Salesforce ecosystem. Damco helps businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact Damco to learn more about the services and solutions that can help transform and build a customer-centric digital-first organization.

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