

Salesforce for Mortgage Lending

Streamline your process, exceed customer expectations.

Salesforce provides mortgage institutions with the capabilities they need to transform the mortgage experience in a way that exceeds customer expectations and creates greater efficiencies for the lender.

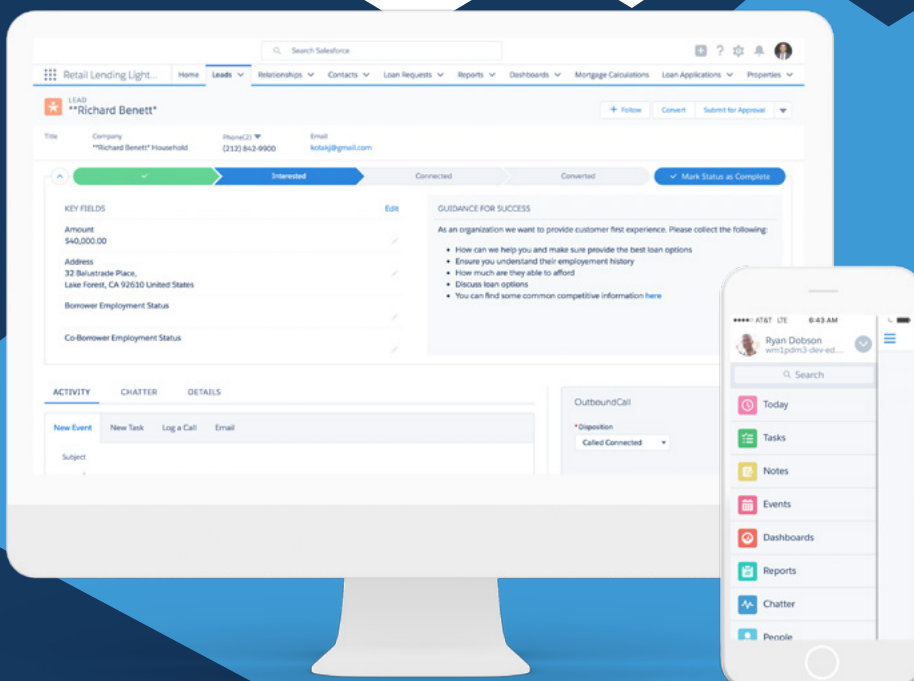
With customers expecting mobile, streamlined experiences, mortgage institutions need a connected platform that is transparent, satisfies customer expectations, and allows lenders to standardize processes at scale.

Salesforce transforms the mortgage process—typically a complex, slow-moving, document-heavy process lacking in transparency—making it smoother, more transparent, more visible, and easier to track. It changes the engagement with brokers and customers, increasing efficiency, productivity, and visibility; it allows for greater internal collaboration; and it provides

mortgage institutions with a 360-degree view of the customer. Salesforce enables mortgage institutions to reimagine the customer experience, providing accountability, trackability, and visibility across digital and high-touch channels, and delivering speed while managing risk.

Salesforce as a comprehensive platform can act as an end-to-end container wherein mortgage processes from existing and third-party systems can be surfaced, allowing for a more streamlined and satisfying experience for both the customer and for the various stakeholders engaged in the origination process.

See how Salesforce is helping lenders adapt faster, act smarter, and differentiate themselves in a rapidly evolving marketplace.



Full visibility on thousands of mortgage applications

Access to the complete status of mortgage applications via the platform, and the ability to see and track all customer engagements.

Ensure innovation, agility, and productivity

Innovate; deliver apps in weeks, not months or days; and simplify, standardize, and automate processes to respond in real time.

How the Salesforce Customer Success Platform can help you streamline your processes and engage customers with a seamless mortgage experience.



SALESFORCE MARKETING CLOUD

Today's mortgage borrowers expect a 1-to-1 relationship with your brand throughout the home-buying or refinancing journey. Salesforce for mortgage and lending marketing creates personalized journeys at scale, nurturing home-buying prospects and keeping customers engaged throughout the mortgage process.



SALESFORCE COMMUNITY CLOUD

Community Cloud lets you build and customize a community to connect and collaborate with customers, brokers, and employees throughout the mortgage origination process. It lets you reimagine the home buying and mortgage experience, where customer, the lender, and third-party stakeholders collaborate in a secure and private manner around a process that spans both traditional high-touch and evolving digital platforms.



SALESFORCE FINANCIAL SERVICES CLOUD

With the client at the center of Financial Services Cloud, mortgage institutions can track financial life goals across the borrower's household. This ensures that brokers and direct lenders are meeting the personalized needs of each customer and his or her family and capturing a footprint of all interactions from initial inquiry through

to move-in day. Financial Services Cloud is also leveraged by mortgage firms to effectively manage relationships, leads, and referrals across the ecosystem of brokers, lenders, and customers.



SALESFORCE PLATFORM

The Salesforce platform lets organizations extend the holistic mortgage process from point of interest through to underwriting and fulfillment, orchestrating, and connecting existing systems and services for a truly digital and customer-centric borrowing experience.



SALESFORCE EINSTEIN

Salesforce Einstein intelligently surfaces timely, relevant, and smart articles, insights, and recommendations to assist buyers at the various stages of the home buying and mortgage process. This adds value every step of the way and in context of customers' interactions and intent – without them having to search for needed insight when the moment arises.

[LEARN MORE](#)

Create an effortless mortgage experience for your customers.

[WATCH THE WEBINAR >](#)

