

FUSION CREDIT CONNECT

Empowering Relationship Managers to Identify New Growth Opportunities Faster



Fusion Credit Connect empowers relationship managers to enhance client communication, reduce errors, and ultimately create more revenue generating opportunities.”

Fusion Credit Connect leverages the power of Salesforce and predictive analytics to identify better opportunities sooner and offer clients a superior customer experience.

The Challenge

Lenders are under pressure on many fronts. Your front-line relationship managers are under increased pressure to maximize revenue, reduce time to close deals, and provide a stellar customer experience.

Your back-office operations are under pressure to reduce costs and boost operational efficiency, but struggle containing costs amid a fragmented technology stack and demands from the front lines for better tools to help close deals.

New online competitors are stealing corporate banking market share due to their speed and superior user experience. Banks are trying to provide the same level of service and efficiency to their corporate clients as they have in the retail sector, but this remains a challenge.

Why Fusion Credit Connect

Fusion Credit Connect empowers relationship managers to identify the best opportunities sooner, enhance customer communication, reduce errors, and ultimately increase revenue. It is designed to provide streamlined end-to-end workflows to improve transparency and operational efficiency for your business. Built on Salesforce Financial Services Cloud, Fusion Credit Connect integrates seamlessly with Fusion Credit Management Enterprise, Finastra's loan origination solution, and Fusion Loan IQ, the market-leading loan servicing solution.

Drive Revenue and Productivity Through Enhanced Deal Transparency



Deal Dashboard

for enhanced visibility and productivity



Collaboration Tools

to drive productivity and faster time to close



Predictive Analytics

to drive revenue growth through next best action

Key Features:

- Intuitive deal dashboard displaying all active applications
- Predictive analytics engine to highlight new revenue opportunities
- Seamless integration with Fusion Credit Management Enterprise, and Fusion Loan IQ for end-to-end operational efficiency
- Salesforce UX for ease of navigation and integrated customer data.

How it works:

Rachel, a Relationship Manager at your bank starts her day by reviewing her deal dashboard displaying active applications with their current status. Items needing immediate action are highlighted. Based on your bank's predetermined configuration of Fusion Credit Management Enterprise, the tasks needed to complete the application process are now displayed on her dashboard.

Rachel can convert opportunities and leads to applications in several ways with Fusion Credit Connect.

Potential opportunities available to Rachel to expand her business contacts are displayed within the leads panel. When Rachel decides to convert a lead, Salesforce pulls information stored in the lead record to create a business account, a contact and an opportunity.

This conversion initiates a blank credit application for the customer. Fusion Credit Connect also uses powerful predictive analytics to provide recommendations for the next best actions for Rachel to take on existing accounts in her portfolio, saving her time and generating potentially untapped revenue opportunities.

Rachel can easily collaborate and assign tasks among all actors on an application. For example, Rachel assigns a task to the Borrower to provide their financials. This helps to speed the application process along and makes it easy for Trevor to comply.

Rachel now sees that all tasks and activities associated with the credit application have successfully been submitted. She makes her final comments and submits the application for decisioning.

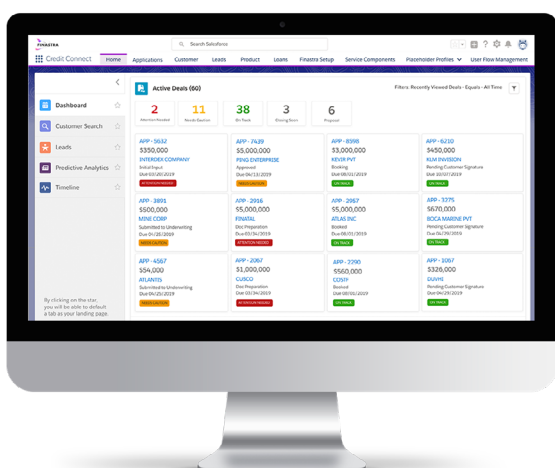
Good news – the credit application is approved and the seamless process through fulfillment in Fusion Credit Management Enterprise and booking in Fusion Loan IQ can begin.

Once the new deal is booked and the loan is funded, Trevor receives an update.

Rachel receives an alert in the Salesforce mobile app, letting her know the new product has been booked, and suggests a Next Best Action. And the cycle of identifying, creating and actioning opportunities continues.

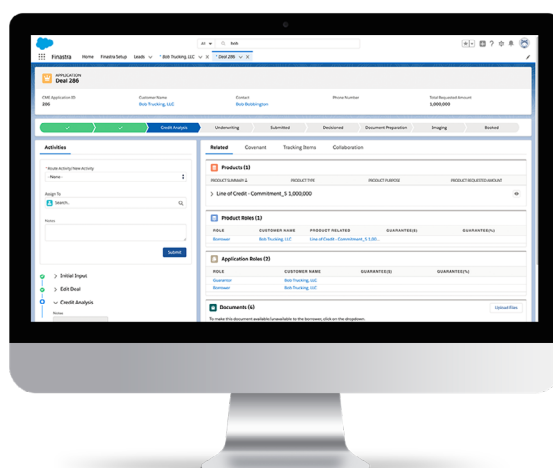
By combining the connected ecosystem of Salesforce Financial Services Cloud and Finastra's FusionFabric.cloud platform, we are unlocking the potential for empowered deal management through streamlined processes and optimized customer experience.

Fusion Credit Connect re-envisioning how relationship managers, borrowers and other key players connect, communicate and engage from opportunity to origination, all the way through to closing and booking.



Intuitive Deal Dashboard

Deal dashboard of relationship manager, showing tasks, pending deals and next best action recommendations using predictive analytics



Detailed Customer Insight

Get insight to make informed product proposals and increase revenue opportunities

Once the credit application has been successfully submitted, Rachel can easily collaborate and assign tasks among all actors on an application, including underwriters and credit analysts.

For example, Rachel assigns a task to the Borrower, asking them to provide their financials and Trevor, the Treasurer, can view that action within the borrower community portal and upload any document required to complete that action.

The Borrower can track the application at every stage in real time within the Borrower community portal. This helps to speed the application process along and makes it easy for Trevor to comply.

Rachel can access her timeline at any point to view products which are reaching their maturity dates, covenants and manage tracking items for submitted applications.

The tracking item will show its due date and its correspondent status such as attention needed (red), needs caution (yellow) and on track (green). To manage results, Rachel can enter the customer name to view specific products, covenants, and/or select a submitted application to view its related tracking items using a range of filters. The results will reflect on the timeline where further detail can be obtained by selecting the icons.



Next Best Action Push Notifications

The Next Best Action recommends a conversation about hedging option

The Results

- Increase productivity of front-line relationship managers
- Exploit untapped revenue opportunities with the information necessary to act
- Improve customer experience through timely notifications, collaborative technology and greater transparency into the credit application process
- Reduce errors with greater transparency into application process and less paperwork
- Simplified complexity
- Shorten time to close and boost application throughput rate.

About Finastra

Finastra is building an open platform that accelerates collaboration and innovation in financial services, creating better experiences for people, businesses and communities. Supported by the broadest and deepest portfolio of financial services software, Finastra delivers this vitally important technology to financial institutions of all sizes across the globe, including 90 of the world's top 100 banks. Our open architecture approach brings together a number of partners and innovators. Together we are leading the way in which applications are written, deployed and consumed in financial services to evolve with the changing needs of customers. Learn more at finastra.com

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