

## Overview

The client is a leading global financial services provider specializing in personal, commercial, and SME segments. With 700 million satisfied customers and a presence in over 7,000 branches, they are renowned for their customer-centric approach. To uphold their business legacy, they partnered with us to streamline loan processing workflows and enhance operational efficiency.



## Objective

Optimize and scale loan processing operations, ensuring compliance, quality assurance and cost reduction.

## Business Challenges

The client struggled with legacy systems, fragmented workflows, and manual processes, prompting the need for automation and optimized workflows to improve efficiency and cost-effectiveness. Their primary challenges were:

- **Lack of Operational Standardization:** Inconsistent branch processes led to inefficiencies and compliance risks.
- **Resource Constraints:** Limited branch resources obstructing business scalability and operational growth
- **Compliance and Monitoring Gaps:** Inadequate document compliance and real-time tracking led to increased risks

## The Solution

Harnessing our expertise in loan processing, our strategy was to centralize credit and disbursement operations across 175 branches of the client. We implemented an automated loan processing application, backed by UAT (User Acceptance Testing) and process design, to optimize processing times and ensure smooth operational flow. Additionally, our BOOMERS web application was deployed to maintain real-time case tracking, and MIS\* (Management Information System) reporting, strengthening compliance controls and improving tracking accuracy.

## Value Delivered

By centralizing operations and integrating automation, we enhanced document compliance and accuracy while strengthening fraud prevention through telephonic verification. Additionally, the integration of real-time application tracking and automated updates further improved customer engagement, enabling seamless communication. This transformation reduced operational challenges for our client and improved their service quality.

**3X** Cost reduction managing 5000+ cases per month across 175 branches with just 58 employees.



Streamlined operations with centralized processes and automation



Informed Decision-making

### Business Benefits



Enhanced Fraud Prevention



Improved Compliance Management



Scalable Operations



Accelerated Loan Processing