

AI Process Automation Enhances Efficiency for a Leading Consumer Lender

Company Overview

A leading consumer lender with a national footprint offers flexible financing solutions for recreational and utility equipment. With over a decade of experience and a vast dealer network, the organization is known for delivering tailored loan and lease options across the outdoor lifestyle market.

The Challenge

Disconnected, manual workflows created operational bottlenecks and slowed down loan processing. Callback emails required manual sorting, data entry, and tracking, resulting in delays, inconsistencies, and scalability challenges across multiple internal teams.

The Approach

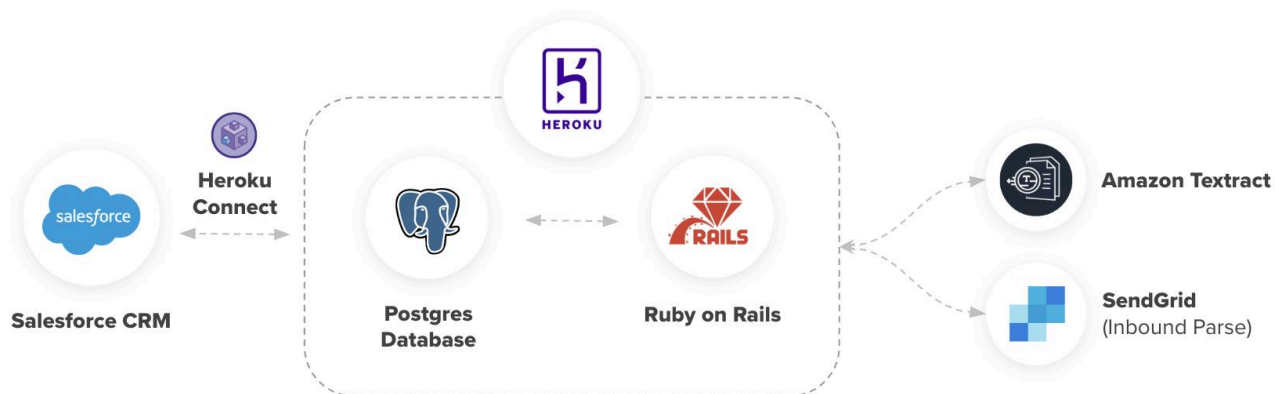
The team collaborated with internal stakeholders to evaluate pain points and identify automation opportunities. Mapped the callback process end-to-end and designed a solution to reduce manual tasks, improve data accuracy, and scale efficiently.

Pain Points

- ✗ Manual email handling
- ✗ Repetitive Salesforce data entry
- ✗ Inefficient callback workflow
- ✗ Limited process visibility

Product Requirements

- ✓ Centralized loan management
- ✓ Automated document processing
- ✓ Salesforce data integration
- ✓ Real-time loan status tracking



From Manual Workflows to AI Efficiency: Streamlining Loan Processes for Better Results

The Solution

To streamline callback operations, the team implemented AI automation to replace manual steps and improve workflow efficiency.



Automated Email Routing – Callback emails are directed into a parsing queue without manual sorting.



Document Parsing with Amazon Textract – Attachments are scanned and key data extracted automatically.



Salesforce-Compatible Data Structuring – Data is formatted for seamless integration into existing records.



Record Matching & Linking – Parsed data is connected to the correct loan files in Salesforce.



Status Updates & Visibility – Callback statuses are updated in real time for improved transparency.

The Results

With the new AI process automation in place, the organization experienced measurable improvements across loan operations and user experience:

- ✓ **Reduced administrative load**
- ✓ **Faster loan response times**
- ✓ **Improved callback accuracy**
- ✓ **Scalable AI workflows**
- ✓ **Better team coordination**

