

APPCENTRICA CUSTOMER SUCCESS STORY

Easy Legal Finance



Industry

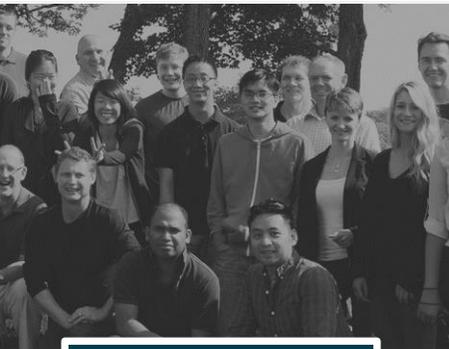
- Financial Services
- Banking: Lending

Project Outcomes

- Improved visibility
- Data consolidation
- Better represented sales model

Solution Features

- Sales Cloud
- Conga Composer integration
- DocuSign integration
- Supported data merger



About AppCentrica

We've built our Salesforce practice one customer at a time based on quality and strong relationships. We deliver proven solutions for:

- Sales Cloud + CPQ
- Service Cloud + FSL
- Einstein Analytics
- Community Cloud
- MuleSoft
- Pardot
- B2B Commerce
- Heroku & Custom Lightning Development

About Easy Legal Finance

Easy Legal Finance is a settlement loan firm that focuses on litigation funding for Canadians with pending injury claims. Headquartered in Toronto, Canada, Easy Legal Finance provides unsecured, non-recourse settlement loans that directly address the needs of plaintiffs and their personal injury lawyers.

Challenge

Easy Legal Finance had already implemented Salesforce but faced a series of challenges that were limiting return on investment. First, the out-of-the-box configuration of Sales Cloud was not adequate to represent the complexities of their business. Second, Easy Legal was seeking an intelligent solution to help streamline the creation and execution of loan and supporting documents. Finally, having recently acquired a smaller financial services organization, Rhino Finance, they were seeking a way to create a unified system of record for their business data and processes.

Solution

AppCentrica was engaged to build out an intelligent, scalable business solution to assist the Easy Legal Finance team. To better represent Easy Legal Finance's business processes AppCentrica designed a custom *Visualforce* layout which represented clients and their respective loans in a consolidated view. Additionally, AppCentrica configured Conga Composer for the merging of data from Salesforce into documents. Similarly, DocuSign was setup as an e-signature solution to help further simplify the process of sending and receiving documents securely. Lastly, AppCentrica supported a data merger with Rhino Finance to ensure data was no longer siloed within separate systems.

Outcomes

Since implementing these much-needed Salesforce enhancements Easy Legal Finance now has a sales engine which is representative of their sales processes. Management has increased visibility and can now easily view customers and drill down into their corresponding loans. As well, the implementation of Conga Composer and DocuSign has greatly improved operational efficiency. The Easy Legal team can now comfortably work using a single system of record and can more easily facilitate loan processing – ultimately meaning their customers receive the funds they need faster.



"While we were quick adopters to Salesforce, we struggled implementing an e-signature solution. Without the expertise and background in programming - where to start? Fortunately, we were referred to AppCentrica by our Salesforce Account Executive and after our internal due diligence, engaged them for an initial project to test fit. We are delighted to have found an organization that listens, is technically competent, client-focused and challenges us to be better through project design. When we went live on our initial project - one that integrated both DocuSign and Conga Composer for the efficient distribution of our loan documents - we were both delighted and relieved! What a difference in time and efficiency for our team. We look forward to working with AppCentrica, as a trusted partner, for future projects, as the needs of our business evolve."



Nicole Popovich
Senior Consultant,
Easy legal Finance