

APPCENTRICA CUSTOMER SUCCESS STORY

MCAN Mortgage Corporation



Industry

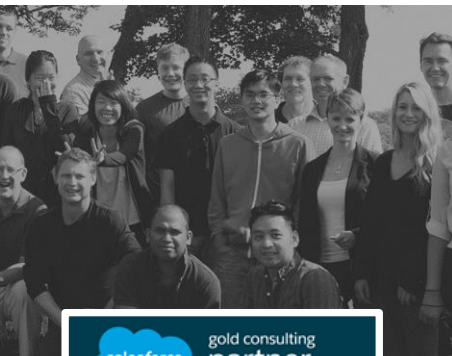
- Financial Services
- Banking and Lending

Project Outcomes

- Improved visibility and forecasting
- Less manual effort
- Increased operational efficiency

Solution Features

- Financial Services Cloud
- Custom Reports and Dashboards



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 MCAN Mortgage Corporation

MCAN is a publicly traded mortgage investment company, listed on the TSX under the symbol MKP. In addition to investing their funds into a portfolio of varying mortgage types including: single-family residential, residential construction and commercial mortgages, they also sell mortgages directly to homeowners via a vast network of mortgage brokers.

Challenge

As MCAN continued to grow they recognized that there were several critical gaps that were impeding sales efficiency. Specifically, they needed to develop a better broker management process. They were heavily reliant on Excel reporting and they could not easily view relationships between brokers, their parent brokerages, closed deals and forecasted pipeline. As well, internal reporting was difficult to produce and a lack of automation forced staff to engage in many different time-consuming manual processes.

Solution

As part of an initiative to develop a scalable operational platform AppCentrica was engaged to implement Financial Service Cloud and help MCAN revamp its broker management process.

Accounts, Contacts and Opportunities were configured to accommodate MCAN's unique business requirements. As well, AppCentrica developed a low-touch, easy-to-deploy integration via data loader to bring in vital broker information from a series of ancillary systems.

Finally, AppCentrica configured a series of automations and authored many reports and dashboards to track sales performance and enable more accurate forecasting.

Outcomes

Since adopting Financial Services Cloud MCAN has seen improved operational efficiency throughout the organization.

Management now has increased visibility into broker performance and can forecast and report on key metrics with ease.

As well, the team is no longer reliant on Excel and data warehousing for reporting and continue to save time on a weekly basis since making the switch the Salesforce.

Overall, the implementation of Financial Service Cloud was extremely successful and MCAN is well positioned for further growth and expansion opportunities.

"AppCentrica supported us with the implementation of Salesforce Financial Services Cloud here at MCAN (an originator of a diverse portfolio of mortgage products across Canada). By connecting Salesforce to our data warehouse, we enabled our business development reps to be productive on the road with mobile. Fady and Mitch from AppCentrica were great. The project was on budget and on time... the whole team is smiling!"

Kim Mercer

Marketing Director,
MCAN Mortgage Corporation