



FinXTech Connect Executive Briefings:

Delivering a People-Centered Experience with Crowe CX for Commercial Lending

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Delivering a People-Centered Experience with

Crowe CX for Commercial Lending

Experience wins.

We all lose when the experience isn't working.



Loan Officer

"I'm trying to build a portfolio, but not having a centralized location for collaboration slows me down."



Underwriting Manager

"I wish we had a better way to get all the right information from our borrowers."



Chief Lending Officer

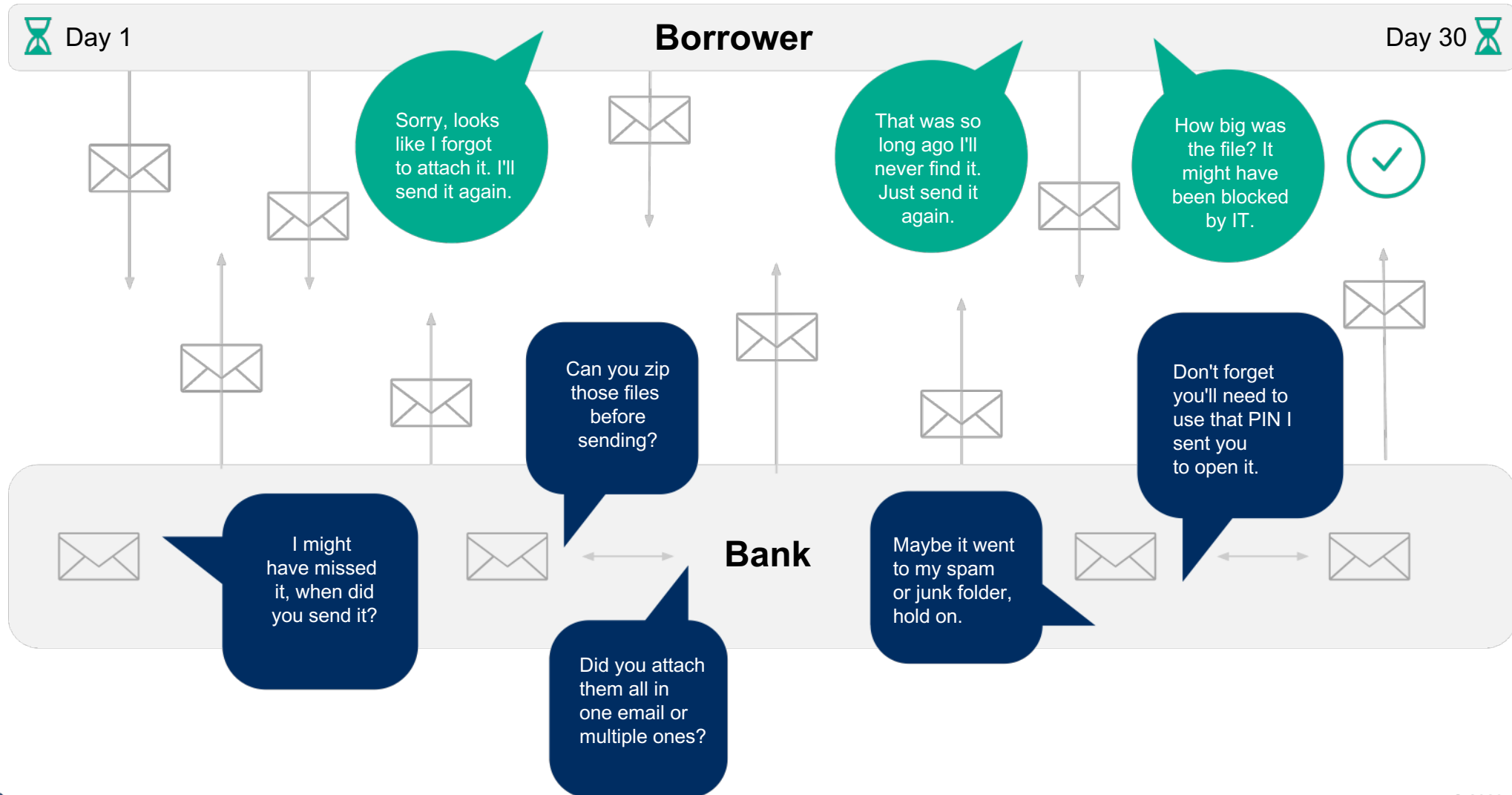
"I don't have a good way to view pipeline, team assignments, and real-time statuses of our deals."



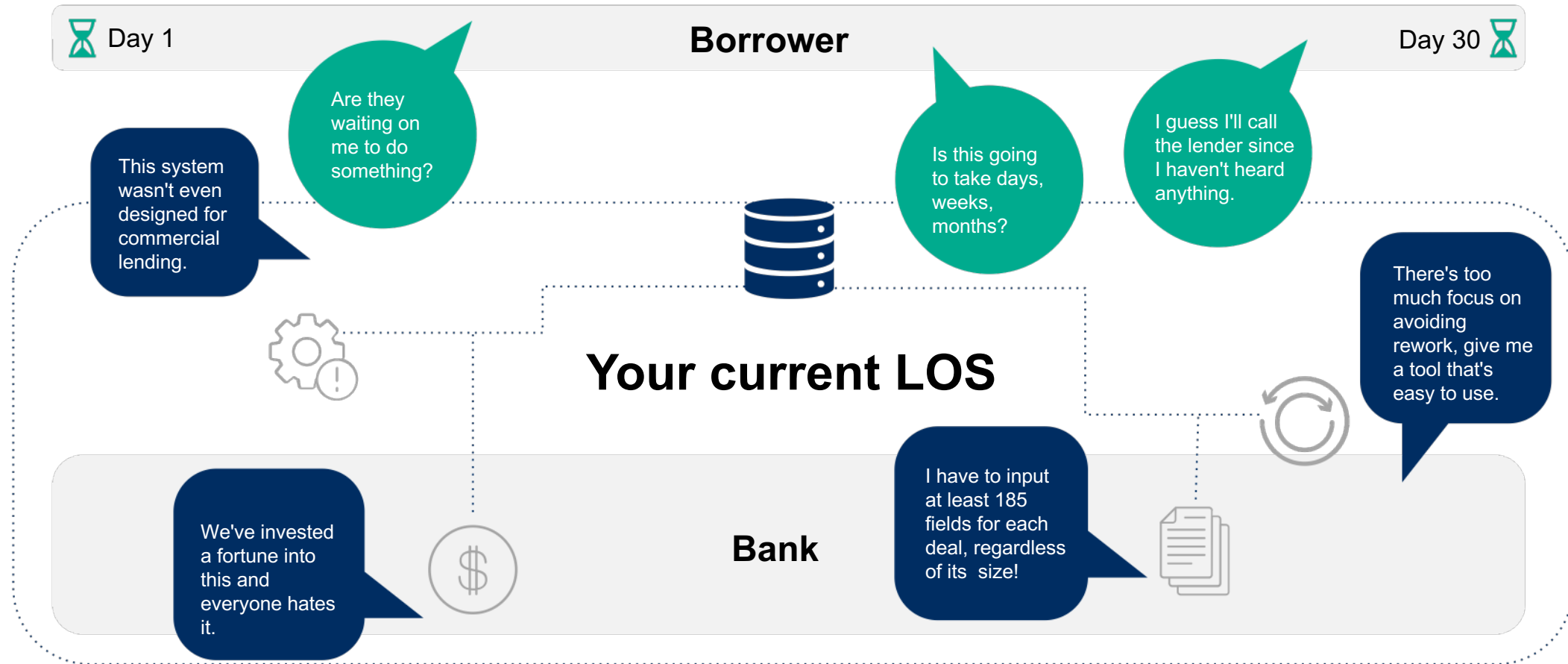
Borrower

"I was a repeat borrower and didn't understand why key details weren't communicated, and I kept wondering 'Did I do something wrong?' "

Email seems easy and secure, but it's not.



Your LOS isn't built for customer experience.





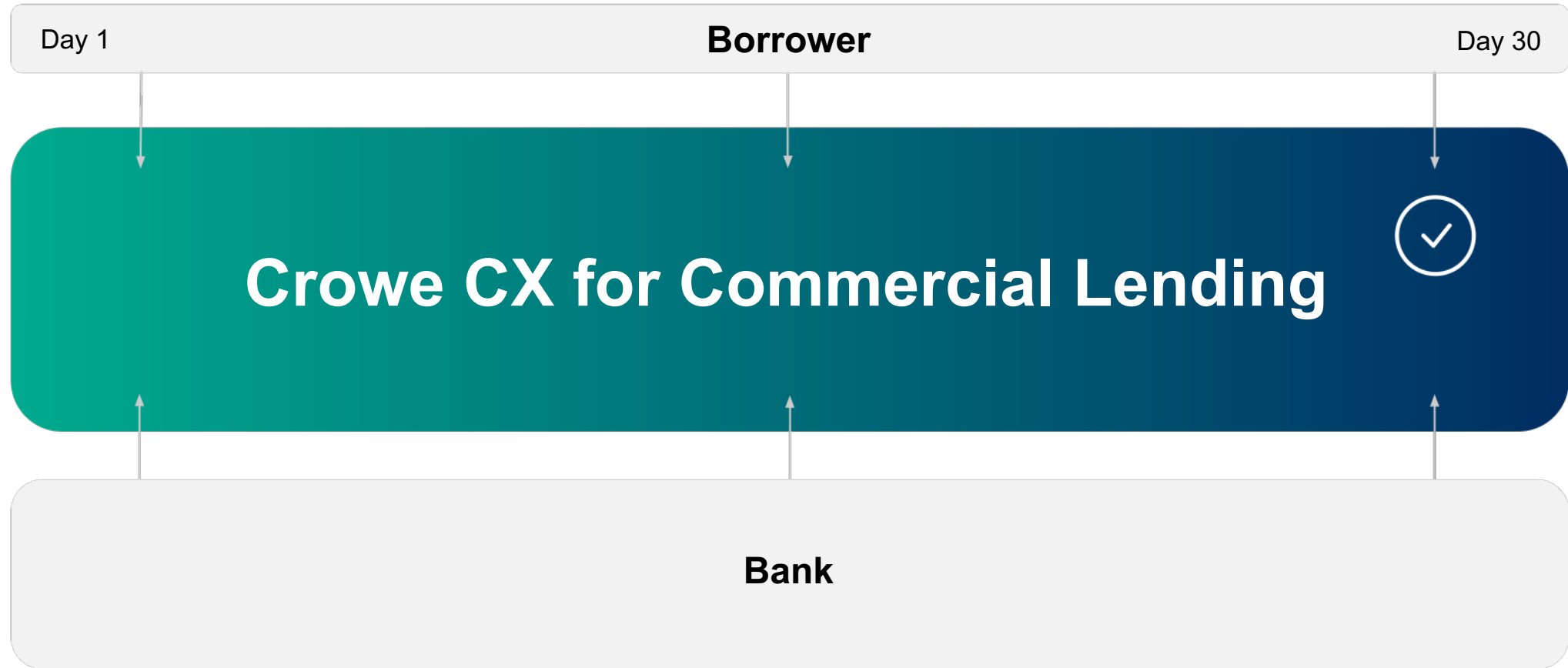
Complex and over-structured systems prioritize process over people.

There's a gap.

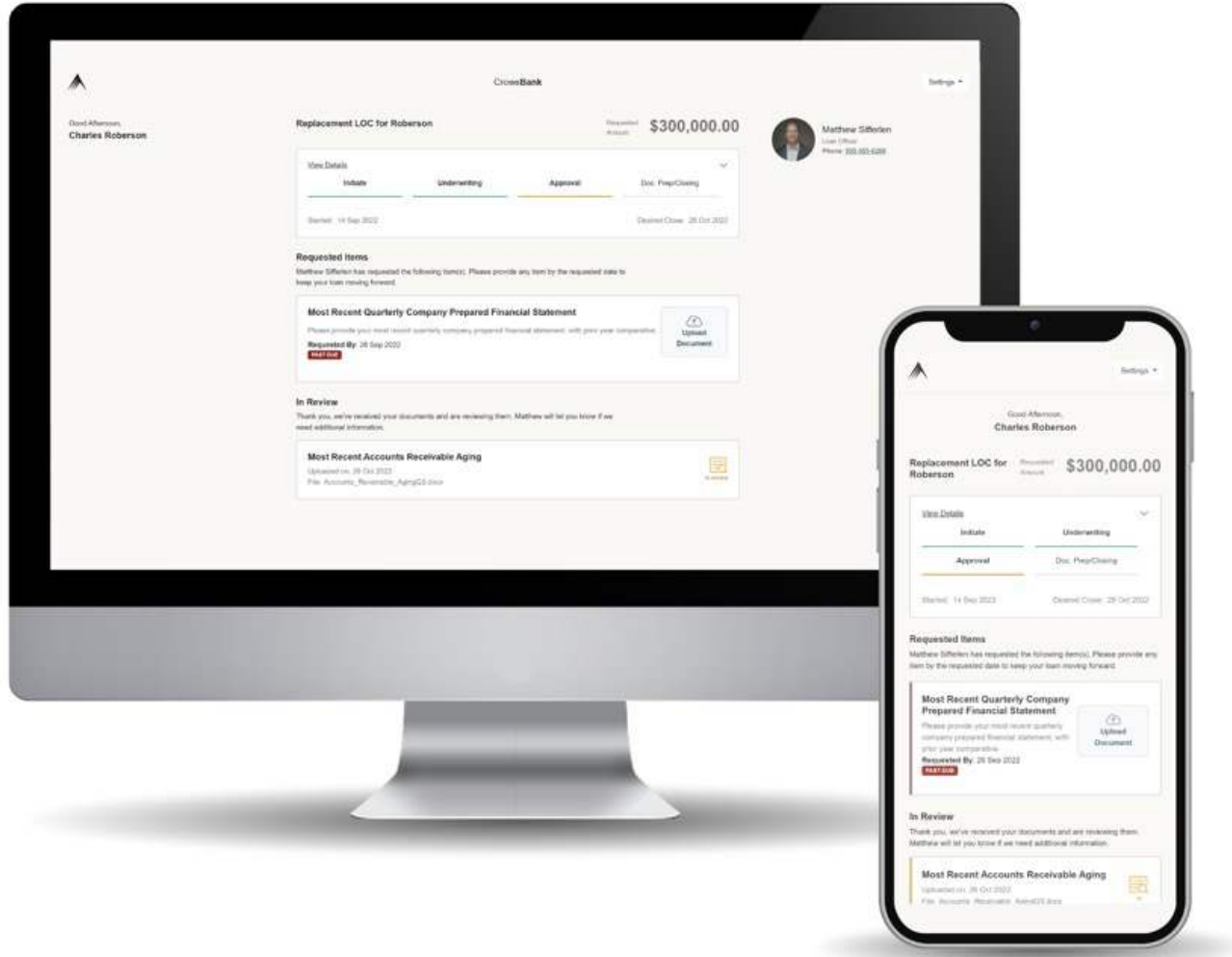


Email and spreadsheets cause internal and external frustration.

What can fill the gap?



We designed a relationship-first experience.



Communication

Communicate effectively with borrowers and third parties using digital channels they prefer

Collaboration

Work in sync with your colleagues so balls aren't dropped

Insights

Use data to focus your team and quickly unblock bottlenecks



Benefits to the experience.

Jobs that Crowe CX for Commercial Lending can:

Automate

New loan requests	Document request checklists
Renewal & annual reviews setup	Secure document uploads
Predefined workflow templates	Notifications for borrowers & lenders

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Eliminate

Status update calls & emails	Redundant checklists
Shared drives	Document handoffs
Secure email & drop boxes	Missed file attachments

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Make More Efficient

Status tracking in one place	Borrower self-service
Shared view of tasks & assignments	Sharing & collaborating on docs
Pipeline visibility	Centralized communication



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**An experience that fuels growth
potential – with a foundation you trust.**

We all win when the experience is working.



Loan Officer

“I have more time to make sales.”



Underwriting Manager

“It’s nice to see our lenders getting the right information on the first try!”



Chief Lending Officer

“We now have insight to the internal communication about a loan request in one place.”



Borrower

“I can’t wait to work with this bank again—they made it so easy!”

Stop by booth #35 to see more



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