

# Small Business Loan Origination Solution Accelerator



## Go live on Salesforce Digital Lending—fast, with pre-built accelerator

Salesforce Digital Lending provides a powerful foundation for banks, credit unions and FIs to digitize loan origination and underwriting. Domain knowledge, Technology landscape knowledge, FSC & DLP product expertise, awareness of industry nuances for implementation planning and execution makes all the difference. That's where Lakeworth comes in.

We've designed and purpose built an accelerator kit for Small Business Loan Origination that gets banks live quickly—avoiding long delays, bloated projects, or SI vendor lock-in.

## Accelerator Kit for Small Business Loan Origination

For FIs seeking a well-defined path to modernize loan origination and unlock ROI fast.

Lakeworth's Accelerator Kit built on Salesforce Digital Lending Platform (DLP) provides a proven path to digitize small business lending. It enables institutions to deploy DLP with preconfigured modules focused on Small Business loan workflows—from intake through underwriting and funding. Pre-defined process flows, entity model, user stories, seed data, automations, integrations and Al-enhanced features kick-start implementations.

# Relationship & Relationship Groups

Establishes household and entity relationships, Customer 360 view across group of companies & stakeholders.

Look up and import company data and industry profile

## Loan Origination Workflow

Guides users through intake, qualification, and product selection with configurable flows and built-in pricing, rate, and fee logic, rate and payment structure

# Document Collection & Management

Automates the request, upload, and validation of required documents based on loan type and stage—powered by OCR and Al, integrated with enterprise document repositories

### Borrowing Structure Definition

Allows grouping of loans along with borrowers, guarantors, and co-signers—enabling visibility into risk exposure and borrowing capacity supporting standard Small Business loan structures

## Lakeworth Digital Lending Accelerator

#### Loan Package

Combines multiple loans into a unified package for internal approvals, customer review and e-signature—reducing back-and-forth and accelerating processing.

#### **Approval Process**

Enables credit officer, approval committee routing with structured review workflows—configurable based on risk tier, product type, or borrowing entity.

#### Closing & Funding

Automates booking, closing, borrower notifications and post-approval handoff to core systems for disbursement—ensuring a seamless transition

## Reports & Dashboards

Delivers real-time insights on pipeline, document status, SLA compliance, and conversion trends—giving teams operational control and visibility.

#### **Business Benefits**

- Leverage digital lending platform trusted by leading financial institutions
- Modernized capabilities leveraging latest technology innovations including Al
- Accelerate time to market through well defined delivery framework and assets
- Lower total cost of ownership through tight alignment with Salesforce Roadmap
- Tailored and Phased rollout to match your unique business needs and priorities

#### **Accelerator Value**

- Designed based on Customer Input
- Pre-defined terminologies, process flows, data model, seed data, story repository
- Pre-built configurable solution with automations, UI components, AI prompts
- Reports and Dashboard templates
- Expert Implementation team with strong alliance with Salesforce DLP Product team
- Up-front focus on user adoption and other key success criteria



digital lending platform



**Financial Services Cloud** 





LW LOS Accelerator

Digital Lending

Financial Services Cloud

Salesforce

**30%** reduction in implementation costs

#### **About Us**

Lakeworth Digital is a boutique Salesforce consulting partner founded by former ProServe leaders. We specialize in helping banks, credit unions, and financial institutions maximize platform value—faster.



Project Reviews

★★★★★

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