



# DRIVE THE BEST LOAN EXPERIENCE,

MOBILE FIRST LOS SOLUTION FOR YOUR BUSINESS.

#1 Mobile lead management and customer onboarding tool enabling collaboration within the team, helping reps to connect efficiently with customers and partners.

Top-lending features to make borrowing simple and effective

## Effective Lead Management System

Auto lead allocation, lead scoring, lead qualification etc.

## Customizable & Flexible In-built Forms

Built in OCR, sharable forms, PDF creator etc.

## Collaboration

2-way communication, training, customer complaints etc.

## Sales productivity

Targets, Personal goals, Leaderboard & KPI



Multi-stage approval



Visit tracking with audio recording



Auto Deviations



Document Management



Partner Management



Sales activities tracking



Auto Underwriting



Collection & Recovery



Sales Campaigns



Business Intelligence

Toolyt is a highly customizable mobile CRM tool that offers everything Lending organizations needs on one single platform. Convert the mobile CRM into a robust automated mobile LOS solution to make your loan application process better & faster.

Adopt Toolyt & transform all the complexities of lending process into customer loyalty, better customer experience and rapid growth of your business.



Time taken to onboard



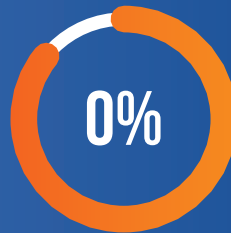
Increment in sales productivity



Reduction in manual dependencies



Cost savings from the entire process



Data leakage

Deliver exceptional lending services via integrations that automate your lending process in reduced TAT



## Case Study

One of India's largest Non-Banking Financial Companies (NBFC) with a track record of 27 years in the financial sector wanted a major overhaul in its turnaround time for customer onboarding.

### Challenges faced by the NBFC :

- Reducing the customer onboarding TAT (Turnaround time) by removing manual / task dependencies and automating certain tasks
- Analyzing large amounts of data to generate relevant insights and actions
- Accessing real-time data from the ground and getting real-time visibility

### Toolyt's Impact:

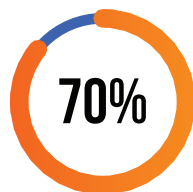
The lending organization was able to speed up the entire **lead-to-sale journey** by automating tasks and bringing in the majority of decisions to the front end.

With the help of Toolyt, the solutions such as **credit check, KYC validation, lead management, profiling, etc.** all could be done in one platform.

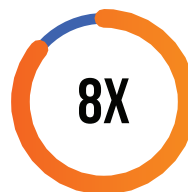
### Results After Adopting Toolyt = Reduction in TAT



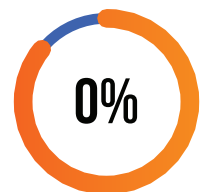
Adoption



Reduction in onboarding TAT



Increase in loan disbursements every month



Zero lead leakage

## Testimonials

**Divya Verma**

*PDEG Chief Manager, SK Finance - Jaipur*

“Toolyt has played a vital role for us in reducing the turnaround time for our SME loan file. And, it was very much due to different functionalities like lead management, gamification and other features used by different teams in different departments to collaborate and gain every information in real-time at their fingertips via Toolyt mobile CRM.”



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