



**SYSTEMSOFT**  
TECHNOLOGIES™

CASE STUDY

# **CAPITAL FUNDING GROUP USES NO-CODE PLATFORM FOR LOAN PROCESS MANAGEMENT**

Streamlining Loan Process Management

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[SSTECH.US](https://www.sstech.us)

## Situation

### *The Capital Funding Group Wanted to Elevate Their Client and Loan Tracking with a No-Code Software Development Platform.*

Capital Funding Group (CFG) of Baltimore prides itself on doing things a little differently than a traditional bank, thinking like business owners to help their clients reach their goals. Founded in 2009, CFG Bank offers financial loans to healthcare industry clients who are building or expanding existing medical facilities.

Although CFG provides creative and holistic solutions for these facilities across the United States, with a focus on long-term care and assisted living, the leading lender was challenged storing and tracking its client and loan information. Solely basing its loan processes on Excel workbooks, with many versions preventing a holistic view of its client list, was keeping CFG from having the proper document workflow to easily tie specific pieces of metadata to each loan and meet its business goals.

CFG realized that solving this business challenge was an opportunity higher on its already high standards of client service and position itself to better operate and grow.

### Strategy

CFG partnered with System Soft Technologies to design, build, and deploy a business solution that combined elements of a customer relationship management (CRM) platform and specialized loan process management tracker.

Through this solution, each of CFG's lending transactions undergoes a workflow process, which tracks specific pieces of metadata tied to each loan. It also validates and generates task capabilities for CFG's loan origination team.

The new system was deployed through System Soft's Quickstrike development methodology and a CitizenDeveloper no-code platform. By using the rapid application approach, the development team experienced faster development and iteration of the product. This provided a custom software experience without traditional coding pitfalls.

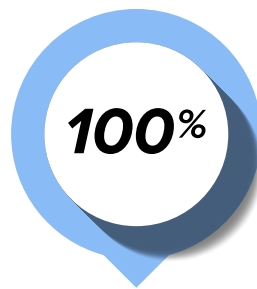
The total time to deploy CFG's new document workflow system was approximately four months.

## Outcome

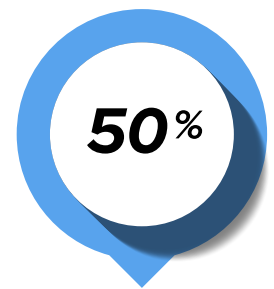
In addition to managing document workflow steps, all CFG's client loan information is consolidated into a single system. Accurate pipeline reporting also results from implementing the system, providing CFG's loan origination team with a clear picture of its business landscape.



*Reduced time on manual processes by over 50% from loan origination to close*



*Loan application process and pipeline gained now has 100% visibility and insight*



*Freed up 50% more time for portfolio managers to focus on strategic planning*

With the success of the workflow document system deployment, CFG is currently rolling out the system across its entire organization.

Following this successful event and engagement, CFG is partnering with System Soft on additional projects, including a holistic data warehouse, RPA processing of incoming documents and expanding the capabilities of the original software project through ongoing development sprints.



## Conclusion

By assembling an enterprise workflow it unifies an organization's data, automates the business and liberates employees from time-consuming tasks. Rapid application development, such as CitizenDeveloper's no-code platform, allows organizations to reimagine business operations through an assessment of business needs and challenges and empowerment of developers to customize an architectural strategy.

Contact System Soft and its rapid application development experts to learn more about its QuickStrike Methodology and the best way to build processes into personalized applications in weeks.

# ABOUT SYSTEM SOFT

## OUR SUCCESS STARTS WITH YOU

At System Soft, we are a family unit powered by diversity, inclusion, transparency, respect, integrity, and passion for our clients and our people. Our business growth depends on your professional development as we collaborate, share ideas and innovation, and invest in our future. By forging a meaningful partnership with our people, we come together with the same purpose, exceeding our goals. This keeps us nimble, ahead of the competition, and on top of our industry. Our continued success begins with you.

### Accelerating Innovation.



Microsoft  
Partner  


Gold Cloud Platform  
Gold Cloud Business Applications  
Gold Cloud Customer Relationship Management  
Gold Enterprise Resource Planning  
Gold Application Development



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