ISID and the Shizuoka Bank Construct a Portal for Home Loan Pre-Application Assessment and Screening Requests Using Salesforce
—Supporting the creation of new customer contact points through marketing automation—

Information Services International-Dentsu, Ltd. (Head Office: Minato-ku, Tokyo; President, CEO & COO: Ryoichi Nawa; hereinafter, "ISID") announces that it has constructed a portal site (hereinafter, "this system") that handles requests for pre-application assessments and screenings for home loans offered by The Shizuoka Bank. Ltd. (Head Office: Shizuoka-shi, Shizuoka Prefecture; President: Hisashi Shibata; hereinafter "Shizuoka Bank") using Salesforce Community Cloud and Salesforce Pardot.

Through the input of a few simple data points, this system allows users to conduct follow-ups on procedures undertaken between the time of notification regarding estimated borrowing limits and home loan pre-screening procedures conducted after properties are chosen. These follow-ups can be performed in a timely manner that matches customer progress on choosing properties. This system is expected to advance customer contact reforms pushed by Shizuoka Bank.

■ Background
Shizuoka Bank is pushing for reform of its sales operation utilizing its channels and IT infrastructure as one basic strategy of its 13th medium-term management plan and is working to strengthen and expand its indirect channels, primarily through the Internet.

Under these conditions, Shizuoka Bank launched Manepita, a home loan pre-application assessment service, in March 2019. Manepita is expected to function as a new point of contact with prospective customers who have just begun considering housing purchases, as it informs users of estimated home loan borrowing limits based on the input of a few simple data points, including age and salary. Shizuoka Bank constructed its portal for opening wrap accounts in August 2018 using Salesforce Community Cloud. Receiving proposals and support from ISID, its construction partner, Shizuoka Bank decided to use the same foundation for Manepita, while adopting even more sophisticated marketing measures.

■ System Summary
This system provides a web-based mechanism that informs users of borrowing limits based on the entry of a few simple data points, which is also one of Manepita's merits. Additionally, it offers an easy-to-use interface and a portal feature that allows users to view progress on procedures undertaken between requests for pre-application assessments and notifications of pre-application screenings. Furthermore, once users have decided upon properties, this portal also offers a feature that allows them to make requests for pre-applications screenings by simply entering a few extra data points.

In addition to these mechanisms, this system automatically sends emails to customers based on procedural progress and their behavior and attributes using Salesforce Pardot, a marketing automation tool. This feature allows for follow-ups that aid smooth procedural progression and prevent customers from withdrawing from the process before it is finished.
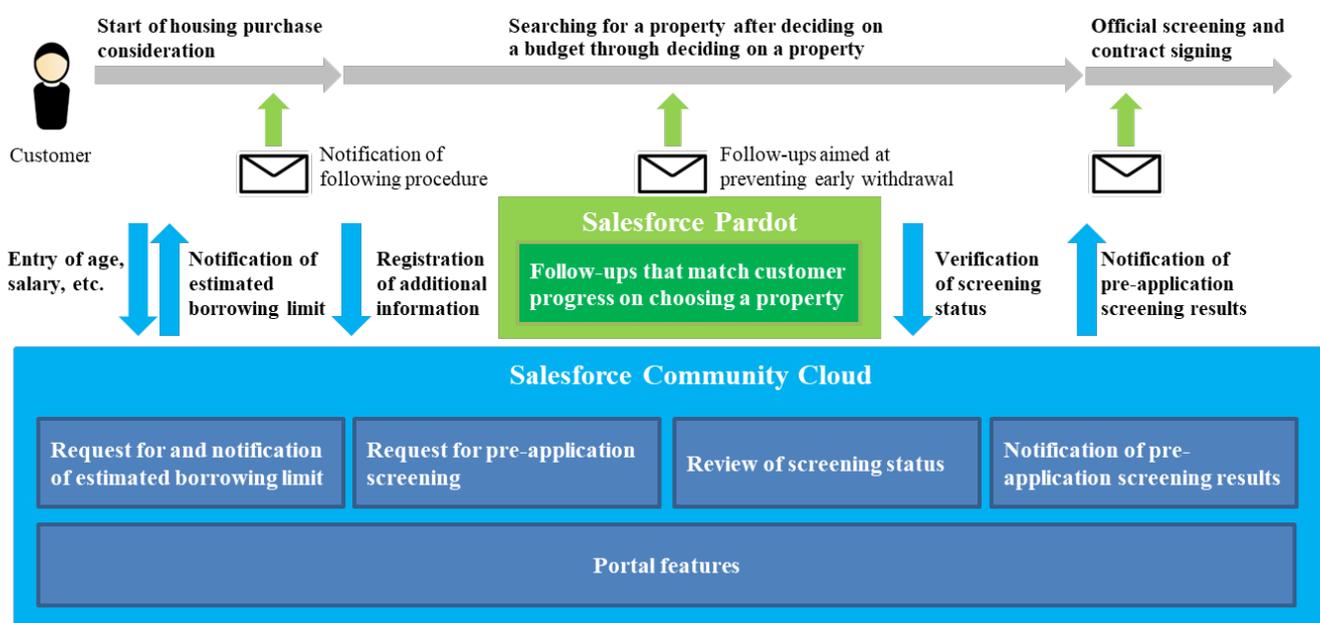
Portal for home loan pre-application assessment and screening request; System summary

■ ISID's Role

ISID's role in introducing this system was to formulate data entry points for home loan pre-application screening requests, redesign operational flow, construct a portal site using Salesforce Community Cloud and develop a user interface. Making use of its prior achievements in the field of digital marketing, ISID also designed marketing strategies for home loan applications and constructed marketing automation mechanisms using Salesforce Pardot. Shizuoka Bank plans to utilize the mechanisms constructed by ISID to provide more diverse products and services in the future.

For some time, ISID has provided a wide variety of solutions in marketing domains of interest to financial institutions, including its retail communication consulting service and system construction for contact centers and online banking. ISID will muster its wide-ranging knowledge, which spans across financial, marketing and cloud-related fields, to contribute to future customer contact reform at financial institutions.

■ Salesforce Community Cloud and Salesforce Pardot

Salesforce Community Cloud is an engagement platform offered by Salesforce.com, Inc. that supports the formation of communities by seamlessly connecting customers with relevant corporate representatives and partners. Meanwhile, Salesforce Pardot, Salesforce.com's marketing automation tool, dynamically judges when and where to send emails based on web tracking and scoring, maximizing the effect of sales.

Note: Salesforce, Salesforce Community Cloud, Salesforce Pardot, etc. are registered trademarks of Salesforce.com, Inc. and are used with permission.

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Related press releases

ISID Launches Provision of Full Cloud-Type Contact Center Solution for Financial Institutions Using Amazon Connect and Salesforce Service Cloud As a First Step, Development of System for SBI Sumishin Net Bank is Underway (announced on February 14, 2019）

https://www.isid.co.jp/news/release/2019/0214.html

ISID Builds Portal Website on Salesforce Community Cloud for Opening Wrap Accounts at Shizuoka Bank (announced on October 22, 2018）

https://www.isid.co.jp/news/release/2018/1022.html

ISID Supports San-in Godo Bank Efforts to Use Digital Channels to Revamp Customer Points of Contact (announced on June 28, 2018）

https://www.isid.co.jp/news/release/2018/0628.html

Related information

Strengthening of sales framework for Salesforce solutions in pursuit of "customer contact reforms" at financial institutions

https://www.isid.co.jp/news/topics/2018/0424.html

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