# How Better Rise Capital Streamlined Credit Checks and Funding Decisions in Salesforce

*Powered by Cloud Maven, Inc Credit Checker*

**ZERO** — **Manual Credit Checks**
Triggered automatically within Salesforce

**~1 Hour** — **Support Response Time**
Average response time for support requests

**100%** — **Onboarding Satisfaction**
Complete satisfaction with implementation & support

## CLIENT & PROCESS CONTEXT

Better Rise Capital is a direct business lender that provides fast and flexible funding to growing businesses in the U.S. Their funding model is built around speed, transparency and customized financing options to help business owners get the funds they need as quickly and efficiently as possible, without the delay and complexity associated with traditional lending methods.

Better Rise Capital has provided funding to over 10,000 businesses and has delivered billions in capital. The reason behind their success is simple. They provide quick approval times, offer multiple loan options, and have a seamless borrower experience, which makes funding decisions very quickly.

## WHY CHANGE WAS NEEDED

1. **Manual Credit Checks**
   Manual reviews slowed funding decisions
2. **Disconnected Credit Process**
   Credit data sat outside Salesforce workflows
3. **Inconsistent Evaluations**
   Teams assessed credit in different ways
4. **Limited Decision Visibility**
   Profiles were unclear during approvals
5. **Processing Capacity Strain**
   Scaling increased operational processing pressure

## THE BUSINESS CHALLENGE

As the business scaled and application volume increased, a major void in the funding process began to emerge. The credit information was not embedded into their funding process. For a company that prides itself on speed and accuracy, this was creating unnecessary friction at the exact moment when funding decisions needed to be made.

Since there was no structure for running credit checks during the application flow in Salesforce, the team was relying on manual checks and other disjointed processes. Not only did this slow the funding process down, but it also created inconsistent evaluations of customer credit profiles across the pipeline.

- There was no built-in method to perform credit checks during the application flow.
- The funding team relied heavily on manual checks, which caused significant delays in approvals in a time-sensitive environment.
- There were inconsistencies in the way credit was evaluated by different team members.
- The funding team had limited visibility into customer profiles at the point in time when funding decisions were being made.

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## THE CLOUD MAVEN, INC SOLUTION

Credit Checker provided Better Rise Capital with an automated and customizable solution that could be easily integrated into their existing funding workflow inside Salesforce. By doing so, manual steps were removed from the funding process, resulting in quicker, more consistent funding decisions. With the use of automation triggered by certain data inputs, the team eliminated the need for manual intervention.

### CORE CAPABILITIES

- **Automated Credit Checks:** Trigger credit checks automatically based on system inputs.
- **Customized Funding Workflows:** Configure workflows to align with the funding process.
- **Credit Workflow Automation:** Reduce manual processing through automated credit actions.
- **Real-Time Credit Visibility:** Give teams immediate access to customer credit profiles.
- **Program Matching Support:** Use credit insights to support better funding program selection.
- **Sales Decision Support:** Provide clearer credit information for customer conversations.

### IMPLEMENTATION APPROACH

The implementation of the Credit Checker product was smooth, creating no disruption for the Better Rise Capital team. The entire setup and customization were handled externally by our team to ensure that the client was able to focus on core priorities.

One of the most impressive aspects of the Credit Checker product was the ease and clarity of the implementation. From the demo to the actual deployment, all expectations were clearly defined and met, resulting in a seamless and easy adoption of the Credit Checker product across all teams.

*"With the credit checker, we were able to put a lot of customizations in place so that we can automatically run credit when certain information is in our system. This takes away a lot of manual labor from our processing team and they're able to work more efficiently."*

**- Lauren Falsetti, Better Rise Capital**

## BUSINESS RESULTS

Better Rise Capital transformed a manual credit review process into an automated Salesforce workflow, helping processing and sales teams make faster, more consistent funding decisions.

**Automated Credit Reviews**
triggered directly from workflow data

**~1 Hour**
average support response time

**100% Satisfaction**
with onboarding and ongoing support

- Processing teams spent less time completing repetitive credit review tasks.
- Funding decisions became more consistent across the organization.
- Better customer-program matching improved financing recommendations.
- Sales teams gained clearer information for borrower conversations.

**Learn more: solutions@cloudmaveninc.com | +1 (740) 470-0000 | Book a demo**