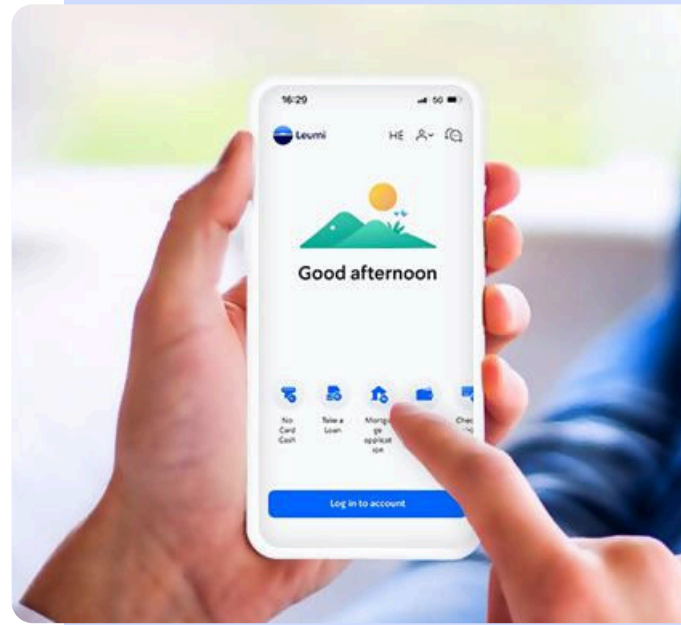# TITAN

Leumi Transforms Customer Experience with a Self-Service Digital Mortgage Process

Founded in 1902, Bank Leumi is the biggest bank in Israel and one of the largest financial institutions in the Middle East.

Leumi's banking system is a leader in technology and digital services, yet it constantly seeks opportunities to innovate processes and boost customer satisfaction.
Recently, Leumi optimized their digital experience for mortgage applications.

The self-service digital mortgage application process had to be tailored based on specific criteria. This includes the type of property the client wanted to purchase and when they required their loan to come through. The client also needed to be able to follow a personalized journey for principal approval.

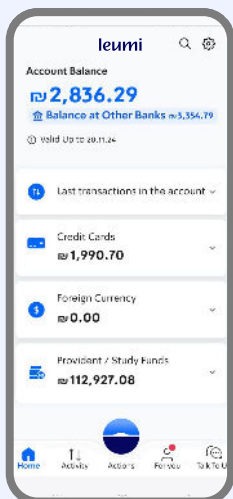| Industry	Customer since	Products	Features
Financial Services	2023	Titan Docs Titan Web	Powerful Integration, Web forms Document Automation

Leumi's Requirements for Digitized Mortgage Applications

Leumi's mortgage processes are all based on Salesforce so their ideal solution needed to integrate seamlessly with the CRM.

Of all the banks in Israel, Leumi is the most digitally advanced and has the most experience developing on top of Salesforce. Knowing the hurdles of Salesforce development, Leumi was looking for a fully no-code solution to implement their mortgage application processes.

Titan Gives Leumi the Edge Over Competitors

By leveraging Titan Web and Docs, Leumi has achieved the following results:

Slashed Approval Time:
Leumi now has the ultimate competitive advantage, approvals can be executed in under 10 minutes.

Streamlined Systems:
Leumi has access to graphs and charts within Salesforce for a 360-degree view of mortgage applications.

Top-notch Security with a Custom Integration for OTP:
This invokes authentication processes in Salesforce and third-party systems.

Enhanced Customer Experience:
the most convenient online mortgage process Leumi has ever built. Clients navigate the mortgage application in minutes from anywhere in the world.

Synced to Salesforce in Real-Time:
Financial data is synced to Salesforce in real-time, with no coding. This includes integration with Salesforce Financial Services Cloud.

What does the Future Hold?

We are thrilled with the efficiency of Titan in helping us take our mortgage process to the next level. We think this platform could enable us to build a Titan team within Leumi. Watch this space." - Eyal Efrat, First Executive Vice President at Leumi Bank