



## 80% Faster Client Submissions At Lexington Capital Holdings

**Industry:**  
Financial Services

**Customer Since:**  
2024

**Products:**  
Enterprise Suite

**Features:**  
Doc Gen, eSign, Portals, Forms, Automation

### COMPANY BACKGROUND

[Lexington Capital Holdings](#) is a financial services marketplace helping businesses access funding across alternative, traditional, equipment, and SBA lending. The organization continues to expand its ability to support SMBs end-to-end.

### LEXINGTON CAPITAL HOLDINGS' CHALLENGE

Salesforce is the operational brain of Lexington Capital Holdings, but getting accurate data into the CRM proved challenging.

Intake-to-lender workflows were slow. While clients completed and signed applications, staff still had to copy and paste data into Salesforce to move deals forward. Errors from misheard details, spelling mistakes, and incomplete entries became common.

Referrals also arrived as emails, leaving reps to chase information and work without a clear context.

### TITAN'S SOLUTION

Titan replaced manual intake and referrals with an Enterprise Suite solution built for Salesforce.

Pre-filled applications are sent to clients to finish and sign, with data written directly to Salesforce. Required documents are uploaded and auto-linked to the right Salesforce records.

Lexington Capital Holdings also launched a partner portal for referrals, documents, deal tracking, and metrics, auto-assigning reps and notifying both sides.



## KEY RESULTS

- ✓ **80% Faster Client Submissions:** Transferring client details previously took up to 10 minutes. With the referral partner portal connected to Salesforce, submissions now take 2 minutes.
- ✓ **60 Fewer Clicks per Deal:** Submitting a new client originally required 160 clicks in Salesforce. With Titan auto-populating key fields, this has been reduced to 100 clicks per submission.
- ✓ **75% Less Admin Time:** After speaking with up to 15 clients per day, manual Salesforce data entry took up to 2 hours. With Titan, this has been reduced to 30 minutes.
- ✓ **3x Faster Cycles:** End-to-end client handling times have dropped from 30 minutes to 10 minutes, reducing cycle times by 67%.
- ✓ **One Process Across Teams:** The intake process now supports multiple teams. The Processing team receives accurate files faster and spends less time correcting data, allowing them to focus on reviewing bank statements and approving clients for lenders.
- ✓ **Reduced Data Errors:** Clients enter their own data, reducing transcription errors in Salesforce.
- ✓ **Structured Partner Referrals:** Referrals are now submitted through the portal as complete, structured packets, replacing informal email-based processes. Salesforce automatically notifies the correct internal owners, accelerating partner-sourced deal intake.

*“Titan’s the full package. There’s no other platform out there that offers everything that they do.” – Frank Lewando, Chief Operating Officer at Lexington Capital Holdings.*