

# TITAN for Financial Services Teams

## Run Client Onboarding, Contracting & Approval Workflows Inside Salesforce

Titan executes these workflows directly in your CRM, delivering governed visibility, stronger compliance control, and faster time-to-revenue.

## Financial Services Pain Points

- ⊗ Client onboarding, KYC, and disclosures are collected across email threads and disconnected portals
- ⊗ Agreements are generated and redlined outside Salesforce
- ⊗ Approvals are coordinated manually across inboxes
- ⊗ Renewals rely on reminders and spreadsheets
- ⊗ Teams lack clear visibility into documentation and approval status
- ⊗ Audit traceability is fragmented across systems



**Result: Slower revenue execution, higher operational overhead, and governance risk**

## How Titan Works Inside Salesforce

### Structured Client Onboarding

Clients complete secure onboarding through branded Salesforce-connected flows. Conditional requirements ensure KYC, disclosures, and supporting documents are complete before submission.

Submissions write directly to the correct Salesforce record with real-time status visibility for advisors and operations.

### Salesforce-Driven Document Generation

Agreements and disclosures are generated from live Salesforce data using controlled templates. Version history and document status remain tied to the opportunity or account record.

### Controlled Review & Approval Workflows

Documents move through structured workflows across compliance, legal, and finance. Approvals are tracked, time-stamped, and recorded against Salesforce records.



### Governed eSignature & Status Visibility

Documents are sent for signature directly from Salesforce. Real-time updates keep advisors, operations, and leadership aligned without manual follow-up.



### Without Titan

- External onboarding forms
- Client documentation collected over email
- Agreements generated and redlined in external tools
- Approvals coordinated across inboxes
- Status tracked through follow-ups
- Fragmented audit trails



### With Titan

- Onboarding validated in Salesforce
- Client documentation captured against CRM records
- Agreements generated from live Salesforce data
- Approvals routed and tracked in Salesforce
- Real-time status visibility across teams
- End-to-end governed traceability

## Outcomes for Financial Services Teams



### Faster Time-to-Revenue

Onboarding, documentation, approvals, and signing move forward as one structured Salesforce-driven process.



### More Complete Submissions

Conditional requirements ensure required documentation is captured the first time.



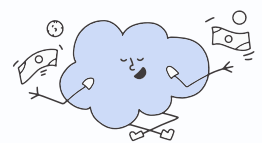
### Lower Administrative Workload

Less time spent chasing documents, approvals, and status updates across teams.



### Audit-Ready Traceability

Documents, approvals, and signatures remain tied to Salesforce records.



## The Bottom Line

**Titan brings onboarding, contracting, and approvals into one governed Salesforce process.**

Financial Services teams operate under pressure to deliver speed, transparency, and control at the same time.

Salesforce remains your system of record. Titan provides the governed execution layer that keeps onboarding, contracting, and approvals connected and fully traceable within it.

