

Implementing a Loan Origination System for the Nation's Largest Internet-Based Bank

Axos Bank (formerly known as Bank of the Internet) is a technology-driven financial services company providing a diverse and ever-growing range of innovative banking products and services for personal, business, and institutional clients nationwide. It is also the largest internet-based bank operating within the United States.

Creating a seamless commercial lending experience for customers

Since 2013, Axos had relied heavily on Salesforce to help drive their customer experience. But in 2018, Axos reached a crossroads. In order to provide a modern commercial lending experience to their customers — while ensuring key people at the bank had visibility into the loan process — they needed to replace their existing commercial loan origination software.

Delivering on time and under budget

After evaluating various solutions, Axos chose nCino and Silverline to plan and implement their loan origination system project. After making their selection, Axos, nCino, and Silverline moved quickly to get the system functional and to market as soon as possible, with three primary project goals driving progress:

- Removing internal silos
- Increasing efficiency to support growth goals
- Having a single-point solution for all loan origination activities

The full project scope was completed on time and under budget, enabling Axos to continue delivering a superior customer experience while maintaining their best-of-breed position in branchless banking.

About Silverline

With significant expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies, Silverline combines Strategic Advisory, technical implementation, and ongoing Managed Services to enable organizations to achieve maximum value with the Salesforce platform. To find out more and get pricing information, contact us at financialservices@silverlinecrm.com.



A single, cloud-based platform and a single workflow

With multiple-point solutions consolidated onto a single, cloud-based platform and by defining a single workflow to enable a scalable loan origination view throughout the organization, Axos is able to communicate with transparency both internally and externally. In addition, Axos is now able to manage loan approvals and loan approval thresholds automatically, improving overall organizational efficiency and decreasing average loan cycle times.

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