



CLIENT CASE STUDY – FINANCE

- 6 Month project**
- Under £1m revenues**
- Zway Starter Pack**
- Finance**
- Automation and AMPLIFIES**
- 2000% ROI**

A niche B2B finance broker in Milton Keynes Buckinghamshire has recently worked with Zway to automate key processes.

This is a fast-growing business and needed to create systemised efficiencies to grow faster and attract new financial products.

During the discovery phase of our work together we agreed to create a new line of IP for the company by Streamlining the Existing Process into a Clear, Branded Framework.

Zway Consultant Pat Graham interviewed the 3 key influencers in the business and spoke additionally with Brokers and the main Tier 1 finance supplier before creating the following solution:



“The BL DRIVEPLAN”

D - Discovery: Understand the client's needs, requirements, and goals to tailor leasing solutions.

R - Risk Assessment: Evaluate the client's financial stability and assess potential risks involved in the financing.

I - Initial Proposal: Prepare and present an initial financing proposal to the client, outlining suitable options.

V - Verification (KYC & AML): Conduct thorough KYC (Know Your Customer) and AML (Anti-Money Laundering) checks to ensure compliance and mitigate risks.

E - Engagement: Build rapport with the client, gather all necessary documents, and confirm their commitment to proceed.

P - Presentation: Deliver a detailed presentation of the final leasing options to the client, ensuring they understand the terms.

L - Legal Review: Coordinate with legal teams to review contract terms and ensure compliance with regulatory requirements.

A - Agreement: Finalize the terms and address any remaining questions or concerns from the client, preparing for the signing phase.

N - Negotiation: Fine-tune terms with the client and lender, if needed, to reach a mutually satisfactory agreement.

This framework and the on-going work to automate all client interactions during the process is transforming the way the business works with brokers and clients.

The new acronym is being communicated to clients and brokers inside an organized roll-out of new services and establishes the business as leaders in their field.

Revenues are now expected to double over the next 24 months as these new strategies emerge creating new opportunities in new niche markets. These outcomes represent 2000% YOY ROI from their investment with Zway.

