

Customer Success Story

CUSTOMER SIZE:

11 - 50

INDUSTRY VERTICAL:

Banking

SALESFORCE PRODUCTS:

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INTEGRATIONS:

Sales Cloud, Pardot
and Experience Cloud

ENGAGEMENT LENGTH:

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Ridge Lending Group Partners with DynProto Enhance Implementation



Ridge Lending Group (RLG) is a second generation company specializing in residential, investment property financing.

Original Challenge The team faced complexities in managing Opportunities and related fields, along with the need to set up Email Templates and Pardot Journeys to support education and engagement. Additionally, there was a requirement for effective lead automation and advanced analytics and insights to track overall performance.

Outcome #1 With Experience Cloud integration and customization of Opportunities, objects, and pipelines, the team gained comprehensive visibility into the entire loan process. Real-time, tailored reporting further enabled stakeholders to track performance, identify bottlenecks, and make informed decisions quickly—leading to improved operational efficiency.

Outcome #2 By building effective email templates and leveraging Pardot automation, the team streamlined lead nurturing and borrower communication. This not only improved engagement at every stage of the customer journey but also reduced manual efforts, ensuring consistent and timely outreach.