

Here are Some Checks Before Cheques

A quick checklist to help you find the right *Loan Origination System*

Sales & Sourcing Teams

- ☐ Digital lead capture across 7+ channels (web, app, WhatsApp, field, etc.)
- ☐ Unified journeys with drop-off tracking and automated follow-ups
- ☐ Geo-tagging and geo-fencing in mobile app for field teams
- ☐ Offline lead capture in low/no-network areas
- ☐ WhatsApp-based lead sharing for channel partners

Credit & Risk Teams

- ☐ Single-screen underwriter view with application, bureau, and key metrics
- ☐ Instant insights from bureau data: repayments, loans, inquiries, derog flags
- ☐ Income assessment workflows for salaried, SEP, and SENP profiles
- ☐ No-code BRE for scorecards, STP rules, and credit policies
- ☐ In-app query management for Credit-Sales-Ops collaboration



Operations Teams

- ☐ Multi-lingual, auto-generated loan kits
- ☐ Split-screen view for parallel document and data verification
- ☐ Multi-party disbursal workflows (applicant, co-applicant, guarantor)
- ☐ Multi-tranche disbursal support with milestone triggers
- ☐ TAT tracking from sanction to disbursal with audit logs

IT & Admins

- ☐ End-to-end configurability: workflows, forms, rules, user roles
- ☐ Support for STP journeys with zero manual intervention
- ☐ Rule updates and process changes without developer effort
- ☐ Environment controls: versioning, testing, and deployment
- ☐ Scalable infrastructure to launch new loan products or partners quickly

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