

A CLEAR PATH TO RECOVERY

A 'Single source of truth'
Salesforce Deployment



A photograph of four coins in motion against a black background. The coins are captured in various stages of a fall or toss, with some blurred to indicate movement. The lighting is dramatic, highlighting the metallic surfaces of the coins. One coin is clearly visible in the foreground, showing its profile and some details of its design. The overall composition is dynamic and visually striking.

Managing Complex Data in Debt Collection

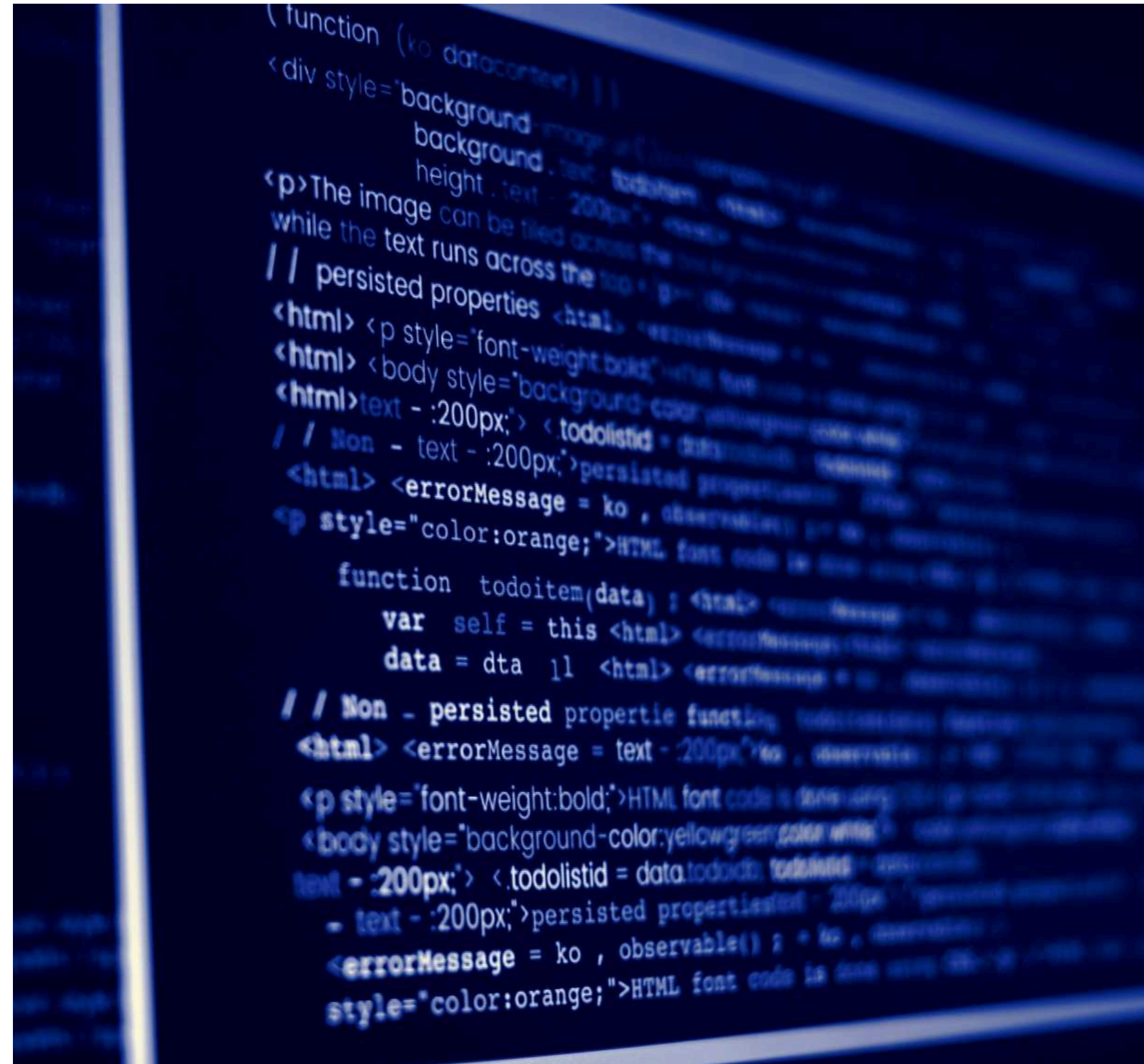
Principal Recovery Group, a financial services company specializing in debt recovery, faced significant challenges in managing its growing client base and complex recovery processes. With the majority of their leads coming from third-party sources such as PropertyOnion, they needed a streamlined solution to manage lead data, track customer interactions, and process opportunities efficiently.

The absence of a unified system led to inefficiencies in data handling, missed opportunities, and lack of visibility into recovery processes. In 2022, Principal Recovery Group engaged DTC Force to implement Salesforce, with a focus on creating a "single source of truth" for their operations and improving lead and opportunity management.

Laying the Foundation For a Customized CRM

DTC Force's initial focus was to lay the foundation for Principal Recovery Group's Salesforce implementation. This included configuring the Salesforce Sales Cloud to streamline lead management, account and contact tracking, and opportunity management. Key deliverables involved creating custom fields and data structures tailored to Principal Recovery's needs, ensuring that the system could handle the unique requirements of their debt recovery process.

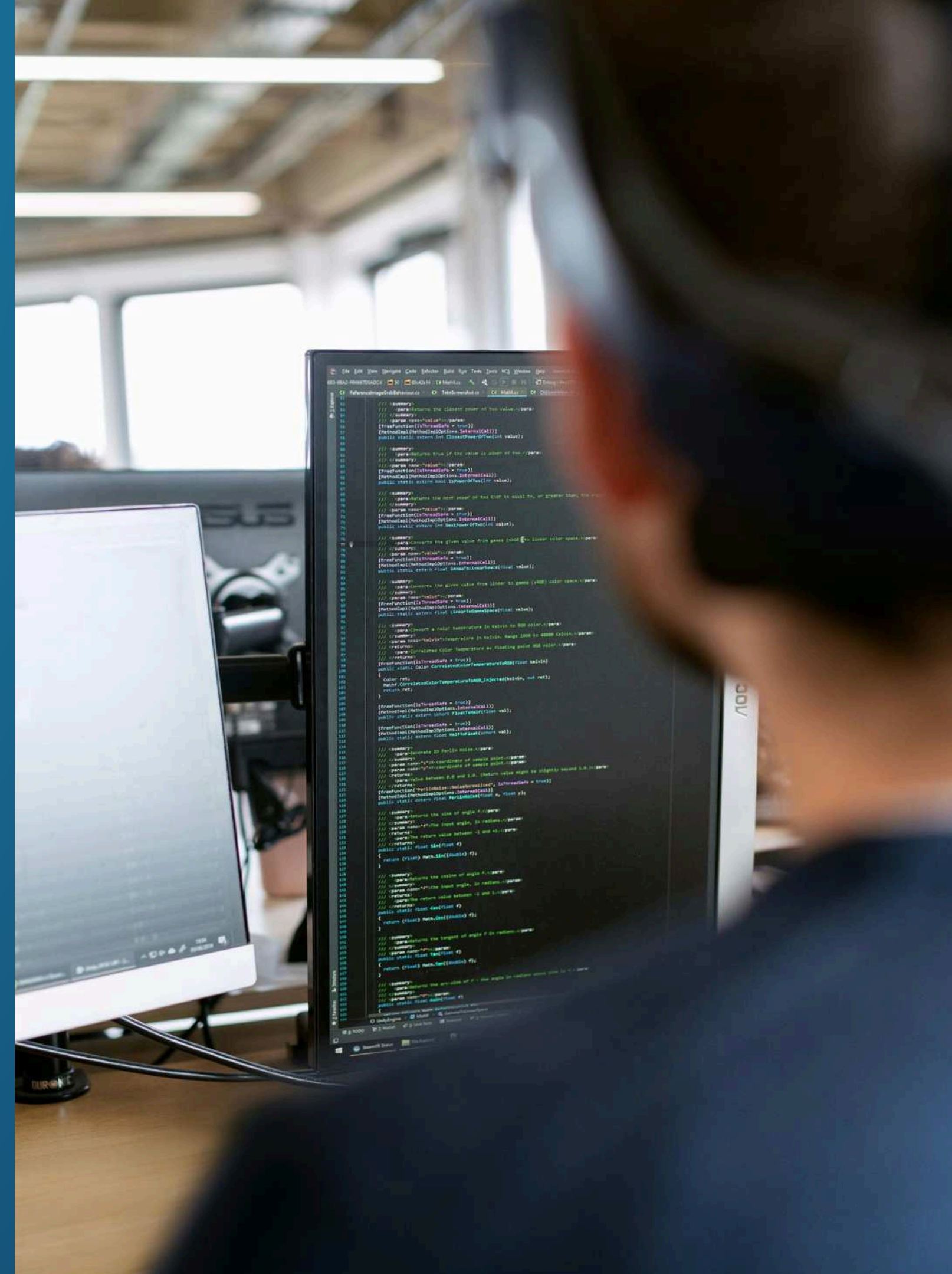
The lead management system allowed the company to upload pre-defined lead data from third-party sources directly into Salesforce, where the leads were nurtured and converted into opportunities. Salesforce's tracking capabilities enabled the team to monitor customer communications, manage tasks, and track activities like calls and meetings. With **50 custom fields** developed for capturing client-specific data, Principal Recovery Group now had complete visibility into every aspect of the lead's journey—from initial contact to a closed deal.



Enhancing Opportunity & Process Management

With the groundwork laid, DTC Force focused on optimizing the opportunity management process. By creating custom workflows and automating key stages in the recovery cycle, Principal Recovery Group could now manage two distinct processes—one for regular deals and another for legal processes involving foreclosures. This dual approach ensured that the right steps were taken for each opportunity, with seamless transitions between stages when necessary.

DTC Force implemented automation that triggered the shift from the standard deal process to the foreclosure process when a case reached the necessary stage. This helped minimize manual errors and reduced administrative overhead. Additionally, the system allowed users to track all relevant documentation, tasks, and meetings, ensuring that the legal process was well-documented and followed a structured, compliant workflow.



Integrated Tools for Efficiency

Proposal Generation and Activity Tracking

A close-up photograph of a person's hand clicking a computer mouse on a desk. In the background, a laptop and some papers are visible, slightly out of focus. The overall scene suggests a professional office environment.

As part of the broader Salesforce configuration, DTC Force integrated document generation and e-signature tools such as DocuSign. This enabled Principal Recovery Group to generate proposals and contracts directly from opportunities in Salesforce, pulling in dynamic account and opportunity details to create ready-to-send documents. The integration also allowed the team to track the status of these documents, providing insights into when they were received, opened, and signed.

Activity management was another key component of the project. With Salesforce's activity tracking features, Principal Recovery Group's representatives were able to log all interactions, including calls, emails, and meetings. This comprehensive view of past and upcoming activities helped the team stay organized and prepared for client interactions, improving the efficiency and quality of their service.

Real-Time Data Insights and Future Scalability

To support data-driven decision-making, DTC Force developed custom dashboards and reports tailored to Principal Recovery Group's operations. These dashboards provided real-time insights into key metrics such as lead conversion rates, the status of ongoing opportunities, and the effectiveness of different lead sources. The system's flexibility allowed the management team to track performance and adjust strategies accordingly.

Looking ahead, the Salesforce platform implemented by DTC Force is scalable, ensuring that as Principal Recovery Group continues to grow, the system can be adapted to support additional processes, automation, and third-party integrations. With a robust CRM infrastructure in place, Principal Recovery Group is well-positioned to streamline operations further, enhance client engagement, and optimize their recovery processes for future success.



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