# tekcetera

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**Case Study:** Spectrum Commercial Lending
**Presented By:** Thy Nguyen
**Date:**

**Our company information:**

| Branch | Tekcetera, Inc. |
|---|---|
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| City, state, ZIP Code | Fountain Valley, CA. 92708 |
| Phone number | 888.782.2600 |
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| Contact name | Thy Nguyen |
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| Title | Marketing Coordinator |
| Phone number | 888.782.2600 ext. 5583 |
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**Customer profile**

| Customer name | Spectrum Commercial Lending |
|---|---|
| Address | 8907 Warner Avenue Suite 201 |
| City, state, ZIP Code | Huntington Beach, CA 92647 |
| Phone number | 714.841.5265 |
| Fax number | |
| Web site address | |

| Industry | Commercial Real Estate |
|---|---|

| Contact name | Curtis Valenzuela |
|---|---|
| Title | Senior Vice President, Credit Manager |
| Phone number | 714.841.5255 or (Cell) 949.350.6009 |
| Fax number | |
| E-mail address | c.valenzuela@spectrum-family.com |

**Company Profile**

Spectrum Commercial Lending has been in the commercial loan processing business for over 20 years, offering products and services at competitive rates to help meet their clients' financial goals. Their combined expertise and experience has allowed them to provide their customers' with the utmost care and service.

**Project Overview**

Being a commercial loan processing organization, the company handles applications such as ACT, Excel Spreadsheets, Word Documents, and emails to manage daily interactions with customers. The process is tedious and complex, creating unnecessary duplication of customer data and errors.

The company's field representatives meet with customers from all over Southern California and Arizona, however, are unable to work efficiently due to the many challenges they face. They experience timely communication with the home office in Huntington Beach. They have to scramble to produce up-to-date documents for their customers through the inadequate organization of companywide documents, forms, and letters. Fortunately, with Tekcetera's expertise, these troubles can be resolved.

The nature of the Commercial/Residential business is far too complex for a standard CRM program to support. Therefore, in collaboration with Spectrum, a Commercial Lending vertical was built. This solution was built using Microsoft Dynamics CRM 3.0, Microsoft's Small Business Server 2003, and Microsoft Share Point. These solutions working together will allow Spectrum Commercial Lending to improve its operational workflow and loan processing procedures. Specifically, all users will have the ability to:

- capture all customer related info in a central location
- consolidate data entry into one application
- eliminate redundant data entry, therefore reducing errors and omissions
- produce standard output formats through captured data
- automate simple calculations such as cash flow analysis into the reports output
- enable off-line date entry for synchronization into a single server

In addition, users will have the ability to print reports through the information inputted on the new Financials tab. Some of the documents included are: the Final Loan Application, Transmittal, Approved Letter, Closing Needs List, Pre-formatted Insurance Letter, Congratulations Letter, Customer and Broker Address Labels, and the Pipeline Report.

Tekcetera's elimination of unnecessary work processes, the consolidation of related tasks and applications, and the integrations of customized features will allow Spectrum Commercial Lending to efficiently assist their customers. Therefore, increasing productivity.

**IT Solutions Tekcetera Implemented**
Microsoft CRM 3.0
SQL Server 2000
Microsoft Sharepoint Server 2003
Microsoft Exchange Server 2003


**What the Client said…**

"Through Tekcetera's in-depth analysis and vision, Spectrum will be able to maximize the use of information while minimizing data input thereby eliminating redundant inefficient processes," stated Mr. Curtis Valenzuela on behalf of The Spectrum Family of Companies, LLC, on project initiation day.

Spectrum is currently enjoying these vastly improved processes, quicker loan close times, and centralized, accurate, real time reporting. In addition, their Sales Reps are delighted with the CRM Outlook Offline capability. The net result is that the clients are better serviced, more informed and more likely to use Spectrum again."