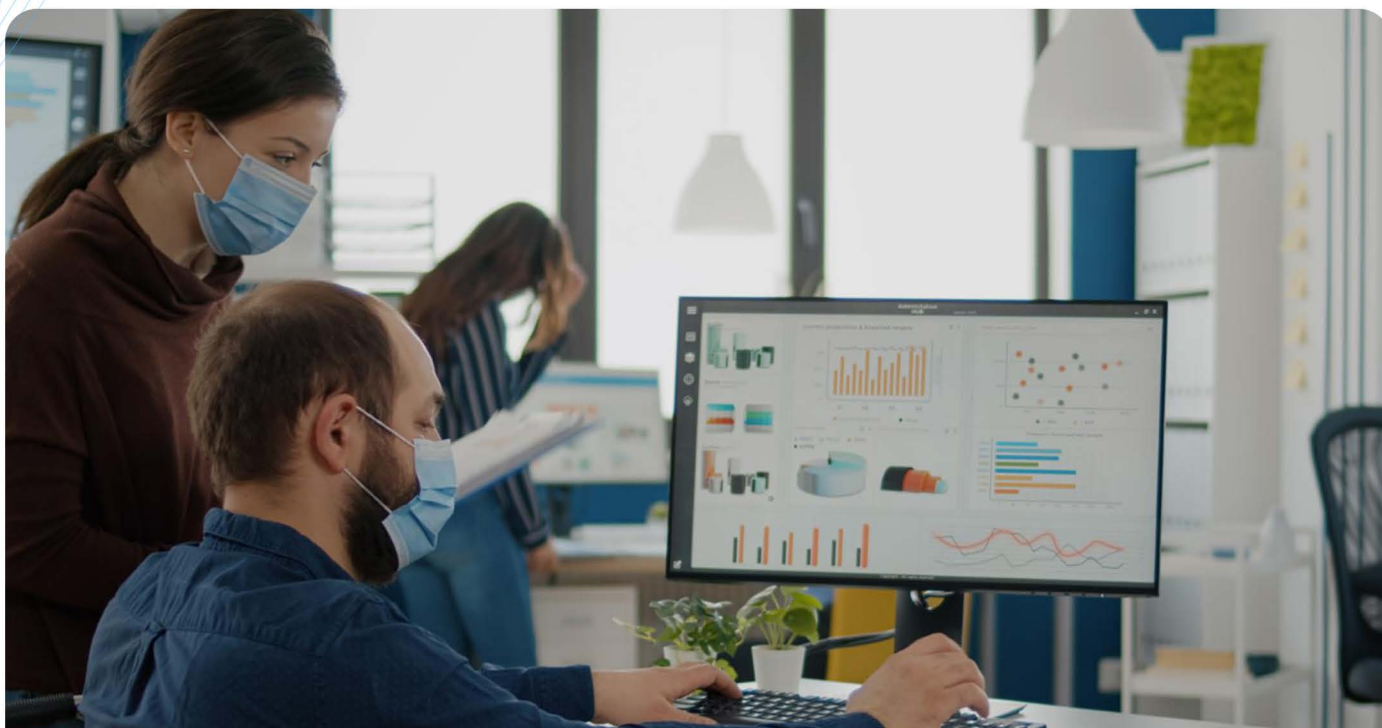




How a U.S. Mortgage Company Improved Customer Data Accuracy with Automated Address Validation in Salesforce



Industry

Mortgage & Lending



Company Size

500+



Region

United States



Featured Solution

360 Verify the Email/Phone (VTM/VTP)

The Customer

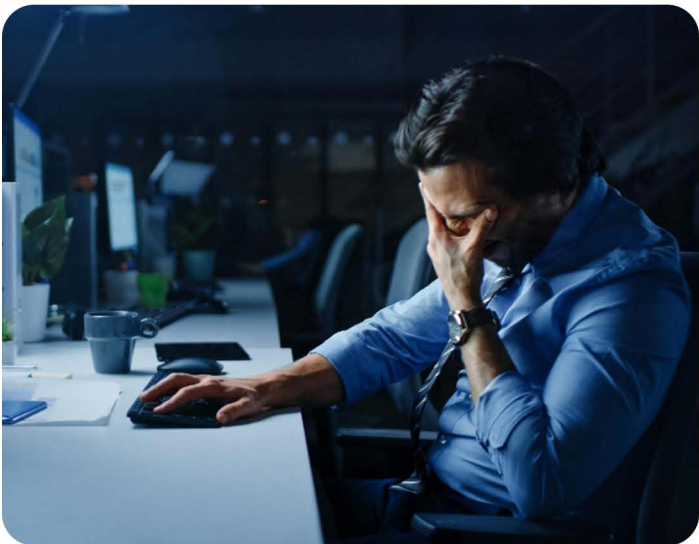
The customer is a U.S.-based mortgage company that managed customer information through Salesforce. Accurate address information was essential for loan officers and customer-facing teams handling customer correspondence, documentation, and other address-dependent processes.

However, incomplete or inaccurate addresses made customer records less reliable and required additional manual checking. As new information entered Salesforce from different sources, maintaining accurate address data became an ongoing challenge. The company needed to improve address data accuracy without disrupting its existing Salesforce workflows.

Problem Statement

The mortgage company relied heavily on Salesforce to manage customer information, but inaccurate or incomplete address data was creating issues across address-dependent processes. Incorrect details could lead to misdirected correspondence, delayed document delivery, and additional follow-up to confirm customer information.

The company needed a reliable way to validate address details before they caused operational delays, while keeping address verification within its existing Salesforce workflows.



The Challenge

Address information from different sources was not consistently validated

Incorrect or incomplete addresses required manual checking and follow-up

Existing Salesforce records needed periodic address-data reviews

Outdated addresses could affect document and customer correspondence

Address changes made ongoing data maintenance difficult

The Solution

360 Verify the Email/Phone (VTM/VTP) helped automate address validation directly within Salesforce. With Verify the Address (VTA), teams could validate customer address details through their existing Salesforce workflows, helping maintain more accurate and reliable records.

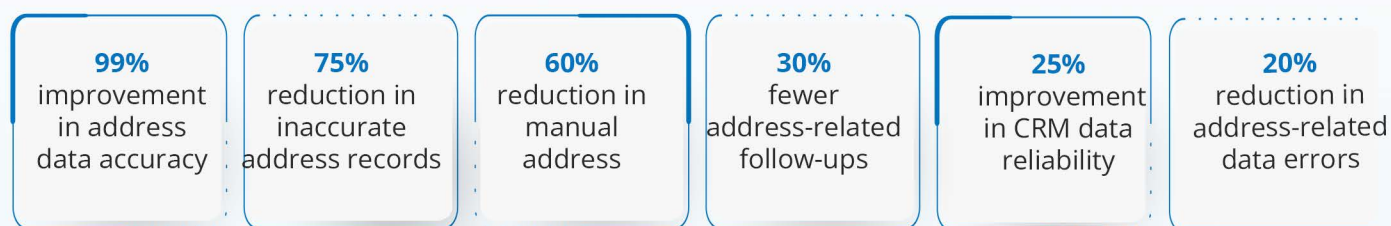
- VTA validated customer addresses to identify inaccurate address records
- Real-time validation checked address details as new data entered Salesforce
- Bulk validation helped review and clean existing address records efficiently
- Manual verification supported individual address checks when required
- Re-verification helped teams review existing addresses as customer information changed
- Verification history and audit trails provided visibility into previous address-validation activity

The Outcome

The company moved from reactive address cleanup to a more proactive approach to address-data management. Salesforce records became more dependable, while automated validation reduced the need for ongoing manual address checks.

With more accurate address information available in Salesforce, teams could work with greater confidence in customer records, reduce follow-up caused by address issues, and support smoother document and correspondence processes.

The Impact



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