

# CLIENT PORTAL

IMPROVE ENGAGEMENT WITH YOUR CUSTOMERS DURING THE LENDING PROCESS AND STREAMLINE THE FLOW OF DATA WITH THE BAKER HILL NEXTGEN® CLIENT PORTAL

In today's online world, you need to provide the digital tools that your customers expect, and you must also provide the very best in customer experience.

With the Baker Hill NextGen® Client Portal, the customer experience is improved by simplifying routine tasks and enhancing communications between you and the borrower during the loan application process.



Transform  
the way you  
engage with  
your origination  
customers.

## WHY CLIENT PORTAL?

Empower borrowers and increase engagement within the origination process.

1-800-821-4455  
[www.bakerhill.com](http://www.bakerhill.com)

## CONNECT

Explore how your institution can engage with customers more effectively with Baker Hill NextGen® Client Portal. To learn more, visit [bakerhill.com/client-portal](http://bakerhill.com/client-portal).

### Make Lending a 2-Way Street

Many financial institutions make the mistake of having a mysterious loan application process where customers have to keep responding to a series of questions and documentation requests without really knowing why. Today's customers want more transparency during the loan application process, and they expect their bankers to provide dialogue and guidance so they don't feel like they're just another customer you're trying to rush through your process. The Baker Hill NextGen® Client Portal is a solution that is accessible to both you and your customers so you can meet their desire for a convenient and simple communication process. Instead of stumbling through other inefficient online tools or inconsistent communication channels, now you can focus on providing the expert guidance that your customers expect.

### Loan Status Transparency

With Baker Hill NextGen® Client Portal, your customers can track their application from submission to loan closing—always knowing what the status is or what may be required of them to complete the next step. This transparency will help remove the stress your customers often feel during the loan application process. No matter what your customer's situation is, Baker Hill is here to help ensure that your relationship with them is strengthened.

### Quick and Convenient Document Sharing

Unfortunately, the loan process is not as paperless as many would like it to be—but it does not have to be a burden for your bankers, and more importantly, your customers. With Baker Hill NextGen® Client Portal, you can quickly inform applicants when documents are needed, and the client portal provides a simple and convenient destination for them to easily upload the documents that are required. The result is a more responsive dialogue between you and your customers that shortens the application process, all achieved through a safe and secure process.

### One Place for Communication

It's important that there is no confusion on how you and your customers will communicate when there are any questions during the lending process. Customers don't want to feel like they're dealing with a bureaucracy. Baker Hill NextGen® allows you to anticipate questions and give quick responses, so that your customers feel a sense of progress being made. With the robust messaging features within the client portal you can update customers, resolve concerns, and make sure that feedback is timely and relevant.

Best of all, the history of your communications will all be saved so you and your customers are always on the same page. By simplifying the communication process the client portal allows you to provide the highest level of customer satisfaction.

Baker Hill empowers financial institutions to work smarter, reduce risk and drive more profitable relationships. The company delivers a single unified platform with modern solutions to streamline loan origination and portfolio risk management for commercial, small business and consumer lending. The Baker Hill NextGen® platform also delivers sophisticated analytics and marketing solutions that support sound business decisions to mitigate risk, generate growth and maximize profitability. Baker Hill is the expert solution for loan origination, portfolio risk and relationship management, CECL, and analytics for financial institutions in the United States. For more information, visit [www.bakerhill.com](http://www.bakerhill.com).

