Phase 10: Final Presentation & Demo Day – Loan Management CRM

The final phase focuses on presenting the **Loan Management CRM System** to stakeholders, demonstrating its functionality, gathering feedback, and preparing documentation for future reference or portfolio showcase.

Pitch Presentation

- Prepare a concise presentation highlighting the **objectives, scope, and benefits** of the project.

Key points to include:

1. **Project Overview** – Purpose: To automate the loan application, approval, EMI scheduling, and payment tracking process for both customers and loan officers.
2. **Problem Statement** – Manual loan tracking caused delays, errors, and lack of transparency for customers and officers.
3. **Solution** – Salesforce-based system with **Experience Cloud portal for customers** and **officer dashboards** for management.
4. **Key Features:**
    - Customer portal for applying for loans
    - Automatic EMI schedule creation for each approved loan
    - Officer approval and verification workflow
    - Email notifications and EMI reminders
    - Reporting & dashboards for officers and managers

- Include screenshots or mockups of the portal, forms, and dashboards.
- Present the **architecture diagram** showing objects, relationships, and automation flows (Loan Application → EMI Schedule → EMI Payments).

Demo Walkthrough

Perform a live demonstration of the system:

1. **Customer Submission** – Show how a customer logs in and applies for a loan.
2. **Officer Verification** – Display how a loan officer receives, reviews, and approves/rejects applications.
3. **EMI Scheduling & Payments** – Demonstrate how EMIs are automatically created and payments are tracked.

4. **Notifications** – Show email alerts for approvals, pending EMIs, or overdue payments.
5. **Reports & Dashboards** – Show dashboards and reports filtered by roles:
    - Officers see all applications and overdue EMIs
    - Customers see only their own loans and payment history
6. **End-to-End Flow** – Emphasize automation, record updates, and real-time visibility.

- Highlight **user-friendly UI** and mobile/desktop compatibility.

Feedback Collection

- Gather feedback from stakeholders, mentors, or end users.
- Use structured forms or surveys to record feedback on:
    - Usability of the customer portal
    - Accuracy and completeness of loan verification and approval workflow
    - Reporting and dashboard clarity
    - System performance, security, and notifications
- Summarize feedback for potential enhancements in future iterations.

Handoff Documentation

Prepare comprehensive handoff documentation for future developers or administrators. Include:

1. **Object Model & Relationships** – Loan_Application__c, EMI_Schedule__c, EMI_Payment__c, Customer, Officer.
2. **Automation Details** – Flows, Process Builder, Email Alerts, Apex classes.
3. **Experience Cloud Pages** – Portal pages, forms, and navigation details.
4. **Security Configuration** – Profiles, permissions, sharing settings, Field-Level Security (FLS).
5. **Reporting & Dashboards** – Summary of reports and dashboards with filters.
6. **Known Issues & Limitations** – Any areas for improvement or enhancements.

- Include links to metadata, code repository, and deployment instructions.

LinkedIn / Portfolio Project Showcase

- Highlight the project as a professional showcase:
  - Brief description of the system and its impact on loan management.
  - Technologies used: Salesforce, LWC, Apex, Experience Cloud, Flows, Reports & Dashboards.
  - Share screenshots or demo video links of dashboards, EMI schedules, and loan workflows.
  - Emphasize your role and contributions (design, development, testing, deployment).
  - Showcase skills in **automation, reporting, and workflow management**.
- Update **LinkedIn, GitHub, or personal portfolio** with a video walkthrough or screenshots to demonstrate practical experience.
- Example GitHub link placeholder: https://github.com/sreejyothirmai/Loan-Management-System.git

Outcome:

This phase ensures that the **Loan Management CRM System** is formally presented, evaluated, and documented for future use. Stakeholders understand the system's functionality, and the project is ready to be showcased as a **professional achievement**.