

A photograph of a man and a woman in a professional setting. The woman, on the left, has long dark hair and is wearing a white button-down shirt. The man, on the right, has short grey hair and a beard, wearing a light blue button-down shirt. They are both smiling and looking at a tablet computer held by the man. A large, stylized green arrow graphic, pointing downwards, is overlaid on the right side of the image, framing the couple.

# *Smarter* Workflows, *Better* Results

How CFTConnect Helped Greenwise  
Financial Solutions Transform Operations  
and Drive Efficiency

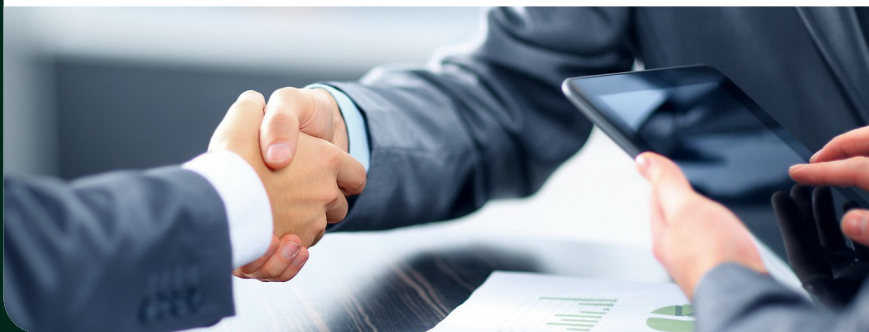


## < OVERVIEW >

# Modernizing Client Management in Debt Consolidation

**Greenwise Financial Solutions**, a growing debt consolidation company, helps clients manage and resolve unsecured debts while guiding them toward financial stability. In an industry where timely communication, accurate tracking, and efficient workflows are critical, managing internal operations can be just as challenging as supporting clients.

To scale effectively and maintain service quality, Greenwise needed a CRM that centralized client management, simplified workflows, and delivered live operational insights. By implementing CFTConnect powered by Priority, Greenwise Financial aimed to improve efficiency, enhance decision-making, and better serve its clients.



## < CHALLENGE >

# Fragmented Systems and Inefficient Workflows Slowed Operations

Greenwise struggled with managing complex client cases across multiple departments, platforms, and third-party vendors. Staff had to navigate disconnected systems, manually track client progress, and compile reports from multiple sources, which slowed operations and created unnecessary administrative work.

The team was also relying on several external vendors for various parts of its workflow. Each vendor introduced separate tools, contracts, support processes, and training requirements. This added cost and complexity. Teams had to move between systems daily, reconcile inconsistent data, and manage multiple support channels. The lack of integration increased labor hours, created bottlenecks, and expanded overhead as the company grew.

This fragmented approach made it difficult to monitor performance in real time, delayed decision-making, and limited the company's ability to scale efficiently. Staff were spending more time managing systems than helping clients, showing the need for a CRM that is intuitive, supportive, and practical. Greenwise needed a CRM that could provide a single source of truth, automate routine tasks, and support their growing operations without adding complexity.

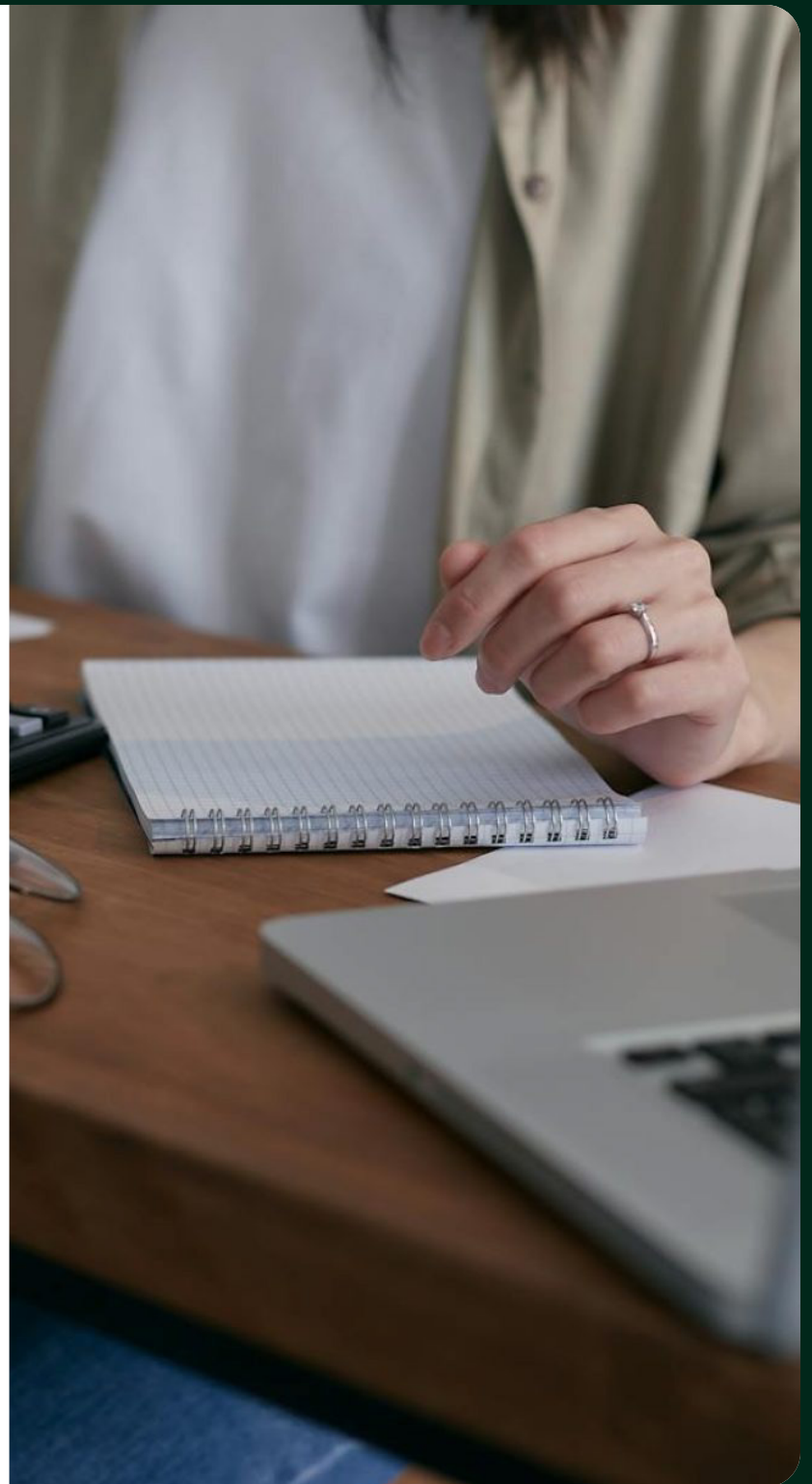
## < SOLUTION >

# Centralized CRM with Live Dashboards and Dedicated Support

To solve its operational challenges, Greenwise needed more than just a tool. They needed a platform that could transform how the company managed clients, tracked performance, and coordinated work across departments. CFTConnect provided a unified solution that brought clarity to complex workflows, made key data accessible in real time, and allowed teams to focus on delivering results instead of managing processes. By integrating multiple vendors such as credit pull, phone, SMS, email, and e-sign into a single platform, Greenwise eliminated the inefficiencies and costs associated with juggling separate systems.

The platform became the central hub for all client management activities and supported both day-to-day operations and long-term growth initiatives. The platform offered:

- **Live Dashboards:** Real-time visibility into client accounts and key performance indicators for faster, data-driven decisions
- **Intuitive Interface:** Simplified workflows, reducing manual data entry and administrative work
- **Custom Workflow Tools:** Practical solutions tailored to address common challenges in debt management operations
- **Responsive Support:** A dedicated team ensured quick issue resolution and ongoing guidance





## < RESULTS >

# Streamlined Operations, Better Insights, and Improved Client Management

The impact of implementing CFTConnect was immediate and measurable for Greenwise Financial Solutions.

- **Increased productivity:** Staff spent less time searching for information and more time supporting clients
- **Faster decision-making:** Live dashboards provide immediate insight into progress and performance
- **More consistent workflows:** Smooth KYC process and fully compliant program management.
- **Improved reporting accuracy:** Live data replaces manual spreadsheets and conflicting information
- **Quicker issue resolution:** Dedicated support keeps processes running smoothly and prevents delays

“

CFTConnect has been the best CRM experience I have ever had. The platform is robust, user-friendly, and helps our team work smarter with practical solutions for everyday workflow challenges. The live dashboards give me real-time KPIs so I can make data-driven decisions quickly. The CFTConnect team goes above and beyond with communication and support, making them the gold standard for CRM partnerships.”



**Lindsey Rosen**  
VP of Operations



## < CONCLUSION >

# A Modern CRM Unlocking Efficiency and Client Success

By adopting CFTConnect, Greenwise transformed its operations by centralizing workflows, improving visibility, and reducing administrative work. The platform's intuitive interface, live dashboards, and dedicated support helps the company operate more efficiently and deliver higher-quality service to clients.

CFTConnect provides a scalable, comprehensive CRM solution for debt resolution companies seeking to streamline operations, make data-driven decisions, and deliver consistent, high-quality client experiences.

See how CFTConnect can support your next stage of growth.

Click [here](#) to learn more.



## About Priority

Priority is the payments and banking solution that enables businesses to collect, store, lend and send funds through a unified commerce engine. Our platform combines payables, merchant services, and banking and treasury solutions so leaders can streamline financial operations efficiently and our innovative industry experts help businesses navigate and build momentum on the path to growth. With the Priority Commerce Engine, leaders can accelerate cash flow, optimize working capital, reduce unnecessary costs, and unlock new revenue opportunities. To learn more about Priority and its publicly traded parent, Priority Technology Holdings, Inc. (NASDAQ: PRTH), visit [prioritycommerce.com](https://prioritycommerce.com).