

opsdog

BPMN 2.0 FORMAT

BANKING

Commercial Loans [Small]

The OpsDog Financial Services Hierarchy

- Banking
 - Retail Branch Operations
 - Commercial Lending**
 - Commercial Loans [Small]**
 - Consumer Lending
 - Mortgage Banking
 - Electronic Banking
 - Wealth Management
 - Merchant & Lockbox Operations
 - Courier Services
 - Back Office Operations
 - Treasury Management
- Insurance
- Broker Dealer
- Investment/Asset Management
- Consumer Finance

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Commercial Loans [Small]: Workflow

- A Sales Pitch & Close
- B On-Boarding & Funding

Workflow Description

The sales, onboarding and initial funding of loans for smaller commercial clients. Includes initial meetings and sales pitches to prospective clients, proposal document preparation, closing, and credit agreement documentation.

Legend

- Start Event
- Intermediate Event
- End Event
- Gateway
- Group
- Task
- Expanded Sub-Process
- Pool
- Sequence Flow
- Message Flow

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT



Login to **OpsDog** to purchase the full workflow template (available in PDF, Visio, PPT)

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