

Navitas Credit Corp. accelerates growth and adoption with IFS Leaseworks and Salesforce integration

Financial Institution Type

Equipment finance company (bank owned)

Product

IFS Leaseworks

Summary

Navitas Credit Corp., an equipment finance company serving small and mid-sized businesses, needed to modernize its technology and improve alignment between sales, marketing, and operations. The organization faced challenges with user adoption, legacy systems, and disconnected workflows that slowed execution.

By implementing IFS Leaseworks and integrating it with Salesforce, Navitas created a unified, flexible ecosystem that supports both originations and relationship management. The result was faster execution, stronger adoption, improved visibility, and measurable business momentum within months.

The challenge: Driving adoption and overcoming legacy limitations

Navitas operates in a unique segment of financial services where speed, responsiveness, and relationship management are critical to winning and retaining business. At the same time, as part of a bank-owned organization, Navitas has to maintain strong controls and data integrity, which adds complexity to its technology requirements.

About the financial institution



NAVITAS CREDIT CORP.

A United Community Company

Navitas, a wholly owned subsidiary of United Community, combines the resources of a top 100 U.S. financial institution with the agility of a specialized lender. With more than 15 years of experience, the company serves businesses across industries and credit profiles, delivering accessible and efficient equipment financing. Recognized by Monitor Daily since 2015, Navitas has built a reputation as a trusted advisor that enables high-volume originations with speed and efficiency.

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Cristian Diaz

SVP, Salesforce Architect
Navitas Credit Corp.

Equipment leasing sales teams are highly performance-driven and expect immediate value from the tools they use. However, many legacy loan origination systems in the industry are outdated, difficult to customize, and poorly integrated with CRM platforms.

When Cristian Diaz joined Navitas as SVP and Salesforce Architect, he brought a strong vision for how modern tools can empower teams to win business while building confidence in the systems they use every day. Drawing on his industry experience, Diaz understood what best-in-class performance should look like—and at Navitas, he found a framework already well-positioned to deliver. The IFS Leaseworks platform could:

- Support both originations and ongoing customer relationships
- Deliver fast turnaround times to remain competitive
- Ensure data consistency across systems
- Provide tools that sales teams would actually adopt and trust



Walking through the Salesforce objects, fields, reports, automation, and data flows, Diaz was blown away. “It provides a true window into Leaseworks within Salesforce. You can see comments, documents, guarantors, and real-time updates,” he said. “It’s been stable for a long time without major issues...[and] you can make targeted changes without breaking anything else. It’s built like a jigsaw puzzle. That design mindset really shows.”

The solution: Flexible technology aligned to user workflows

Navitas had implemented IFS Leaseworks and integrated it with Salesforce to create a seamless, bidirectional data environment. The approach focused on designing around sales teams' needs by aligning tools with real-world workflows rather than imposing standardized processes. This helped reduce friction and improve adoption.

The integration between IFS Leaseworks and Salesforce enables teams to manage both originations and customer relationships in a connected environment, with real-time data visibility across systems. Automation, improved reporting, and a modern system architecture further enhanced efficiency and reduced turnaround times for requests and updates.

**Learn more about IFS
Leaseworks**



"In six months, we've accomplished more than I did in three or four years with other systems," Diaz said. Sales teams gained real-time visibility into deals, documents, and customer data within Salesforce, improving both efficiency and decision-making. By aligning technology with user workflows, the organization improved adoption and strengthened collaboration between sales, marketing, and operations—contributing to portfolio growth and overall momentum.

Less friction, stronger partnership

Navitas found that the value of IFS Leaseworks extended beyond the technology itself to the expertise and responsiveness of the team behind it.

Consistent support, clear communication, and deep knowledge of both Leaseworks and Salesforce enabled faster problem-solving and stronger user confidence.

"The people running the system are the most valuable part," Diaz said. "You can have a system that does everything, but if you don't have people who can clearly explain it—especially to someone new—it doesn't matter. With Leaseworks, I feel like I'm their only customer. They respond within minutes with clear explanations, definitions, and solutions. They also understand Salesforce, so they can translate things in a way I understand."

About Abrigo

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