



# Pathway Lending

**Salesforce.com**

**Connecting Impact & Efficiency  
Through Technology**

**July 19, 2012**



Pathway Lending

# About:

**Pathway Lending** - A statewide CDFI providing loans and Technical Assistance to economically underserved businesses.

## Staff:

21 Employees from 4 Offices Across Tennessee

## Activity:

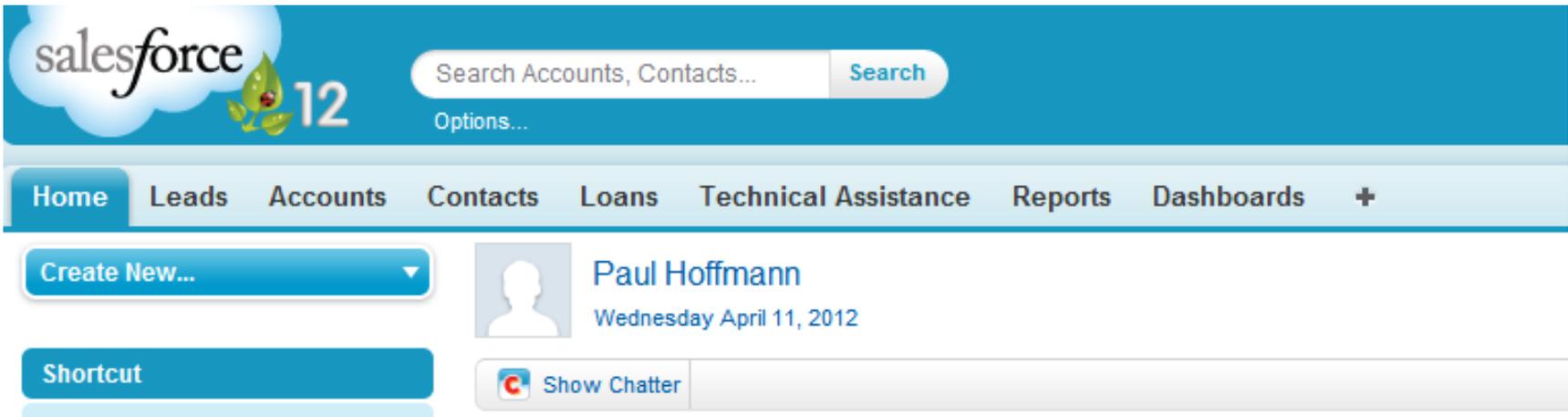
Loans Outstanding:	\$27MM
Q1 2012 Originations:	\$5.5 MM (36 Loans)
Q1 2012 TA:	1200 Hours

# Technology Needs:

- *Manage* client relationships,
- *Streamline* reporting to partners, and
- *Organize* data to tell our story.

# Solution: SALESFORCE.COM

- **EASY TO ACCESS:** Cloud-based
- **EASY TO NAVIGATE:** Intuitive system that we control, offers diverse training modules
- **SECURE:** Advanced internet security, more than 77,000 business accounts
- **CUSTOMIZABLE:** Living systems that evolves & expands with our changing business needs
- **AFFORDABLE:** No or low-cost for Non-Profits



## ***SALESFORCE MANAGES THE RELATIONSHIP OVER THE ENTIRE CLIENT LIFECYCLE***

- Lead Development
- Account Intake & Tracking
- Loan Management
- Technical Assistance Tracking
- Outcome Tracking – Reporting

# Lead Development:

Home **Leads** Accounts Contacts Loans Technical Assistance Reports Dashboards +

Lead  Mr. John Doe

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 Show Chatter  Following 

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[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [HTML Email Status \[0\]](#) | [Campaign History \[0\]](#)

## Lead Detail

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Company	ACME	Lead Type	
Name	Mr. John Doe	Loan Amount	\$50,000.00
Title	President	Loan Request Amount	
Phone	55512312134	Lead Status	Open
Email	<a href="mailto:john DOE@acme.com">john DOE@acme.com</a>	Rating	
		CDFI Qualified	<input checked="" type="checkbox"/>

## ▼ Address Information

Address	123 Main Street Nashville, TN 37206	Website	
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## ▼ Additional Information

No. of Employees	5	Lead Source	
Annual Revenue		Industry	
Description	ACME LLC is a machinery shop located in a CDFI qualified census tract - Nashville, TN. The organization has 5 employees and is seeking a loan of \$50,000 to purchase a new piece of machinery, expand to a third shift, and hire 2 additional employees.		
Created By	<a href="#">Paul Hoffmann</a> , 4/10/2012 2:16 PM	Last Modified By	<a href="#">Paul Hoffmann</a> , 4/10/2012 2:16 PM

# Account Intake & Mgmt:

Home Leads **Accounts** Contacts Loans Technical Assistance Reports Dashboards +

Account  
**ACME - 1**

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[Contacts \[1\]](#) | [Loans \[1\]](#) | [Technical Assistance \[1\]](#) | [Open Activities \[1\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

## Account Detail

[Edit](#) [Delete](#) [Sharing](#)

Account Name	ACME - 1 <a href="#">[View Hierarchy]</a>	Authorized Signer	Mr. John Doe
Parent Account		Phone	55512312134
Tax ID	12-1234567	Website	
Business Description	ACME - 1 is a machine shop located in a CDFI qualified census tract in Nashville, TN. The business produces engine components and is part of Nissan's local supply chain.	Account Owner	<a href="#">Paul Hoffmann</a> <a href="#">[Change]</a>
Status - Client	In Process: Application Received	Client ID	

## ▼ Additional Information

Client Type	Business	Business Structure	Sole Proprietorship
Ownership	Private	Annual Revenue	\$5 million & below
Industry Description	Specialty Trade Contractors	Date Established	01/01/2000
NAICS 3	238	Employees	5
Billing Address	123 Main Street Nashville, TN 37206		

## ▼ CDFI Data

CDFI Qualified	YES	IA Qualified	YES
Low-Income Owned	NO	LMI Qualified	YES
Minority Owned	YES	Business Tract	Moderate
Women Owned	NO	Project Tract	Moderate

# Loan Management:

Loans  **ACME - 1: Equipment Purchase**

 Show Chatter  Following 

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## Loans Detail

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Account Name	<a href="#">ACME - 1</a>	Priority	Medium
Loan Name	ACME - 1: Equipment Purchase	Loans Owner	 <a href="#">Paul Hoffmann</a> <a href="#">[Change]</a>
Close Date	 6/30/2012		

### ▼ Application Details

Application Received	4/9/2011	Lead Source	Partner Referral
Application Decided		Application Origin	Electronic - Website

### ▼ Project Address

Street Address	 123 Main Street	CDFI Qualified	YES
City	 Nashville		
State	 TN	County	 Davidson County
ZIP Code	 37206	Census Tract	 47037011000

### ▼ Project Detail - General

Loan Amount	\$50,000.00
Stage	Application Review - Analysis
Probability (%)	0%
Project Type	Biz: Equipment Purchase
Project Description	ACME machine shop has requested \$50,000 for the purchase of a new piece of milling equipment. This equipment will allow the business to expand its production schedule, add a third shift, and create two new jobs.

# Technical Assistance:

Home Leads Accounts Contacts Loans **Technical Assistance** Reports Dashboards +

Technical Assistance  
TA# 00000130

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[Attachments \[0\]](#)

## Technical Assistance Detail

Edit

Delete

Close Technical Assistance

Clone

Account Name	<a href="#">ACME - 1</a>	Technical Assistance Origin	Pre-Loan Client
Contact Name	<a href="#">John Doe</a>	Priority	Normal
Contact Phone	55512312134	Status	Ongoing/Open
Contact Email	<a href="mailto: johndoe@acme.com">johndoe@acme.com</a>		
Technical Assistance Owner	 <a href="#">Paul Hoffmann</a> <a href="#">[Change]</a>		

## ▼ Technical Assistance

Duration (Hours) 	3.00
TA Date	4/9/2012
TA Type	Walk In Meeting
TA Subject	Accounting or basic financial training; Business plan development
Subject	Loan Application Review and Business Planning
Description	John Doe, owner of ACME Machine Shop, visited our Nashville office to discuss his loan application and how to improve his business his application and associated financial documents. Began drafting a business plan for the applicant.

## ▼ Client Loan Information

Client Status	Pre-Loan
Date Loan Originated 	

# Reporting:

Home Leads Accounts Contacts Loans Technical Assistance **Reports** Dashboards +

## Reports & Dashboards

[New Report...](#) [New Dashboard...](#)

**Folders**

Find a folder...

**All Folders**

- Unfiled Public Reports
- My Personal Custom R...
- My Personal Dashboards
- Company Dashboards
- Google AdWords Dash...
- Google AdWords Repo...
- Account and Contact R...
- Loans Reports
- Sales Reports
- Lead Reports
- Support Reports
- Campaign Reports
- Self-Service Reports
- Administrative Reports
- Activity Reports

**All Folders**

Find reports and dashboards...

Action	Name
	<b>Technical Assistance Report</b>
	<b>Application Count</b> Applications Received - Previous 2 Quarters
	<b>Active Account Report</b> All Active Loans
	<b>Account Status Review</b> Provides a list of all accounts in the system.
	<b>CDFI Transaction Report - Loan 2</b>
	<b>Pipeline Report - Loan 1</b>
	<b>Year-End Loan Review</b> Run at year-end to remove inactive loan data from system. Only remove loan data from previous year and do not remove account or contact data.

# Ease of Use: PROS

- **MOBILE:** Accessible anytime, anywhere
- **FAST:** System up and running within days
- **INTUITIVE:** Easy to understand, navigate, & customize
- **CUSTOMIZABLE:** Custom fields, page layouts, & reports
- **COMPATIBLE:** Has the ability to sync with other systems

# Ease of Use: CONS

- **MANUAL:** Creating a culture of data mgmt and entry can be challenging
- **CHANGE MGMT:** Evolving system needs may be costly in terms of man hours spent.
- **COST TO SYNC:** Integrating with other systems can be costly and time consuming
- **IT SUPPORT:** Services beyond basic troubleshooting are potentially frustrating

# Operations:

- **COST:** Non-Profits are eligible for 10 free licenses. Licenses are otherwise very affordable
- **INSTALLATION:** Cloud-based, no installation or hardware is required
- **INTEGRATION:** Integrates with Outlook – syncs calendars, contacts, reminders, and emails
- **MAINTENANCE:** Upgrades automatically push to you, no impact to data or customized fields

# Other Benefits:

- **COMMUNITY:** Growing number of CDFI/Micro Lenders are using the platform, best practice development is occurring now
- **FOUNDATION:** Salesforce Foundation is committed to helping non-profits, and is willing to donate time and services

# Contact:

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