Wall-to-wall Salesforce

Pradip Sitaram, Enterprise Community Partners
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The problem we set out to solve

Too many systems!
Too many databases!
Too many silos!
Too Complicated!
Un-documented!

Our Goals

• Consolidate
• Simplify
• Integrate
• Streamline
2013 OPPORTUNITY FINANCE NETWORK CONFERENCE

Target High-level Conceptual Architecture

Applications built in about 2 years

- Our Corporate website (www.enterprisecommunity.com); Our Intranet
- Chatter (including with Partners)
- Community Impact Note: Opportunity and pipeline management and CRM
- Grants & Contracts management system
- Green Forum (www.enterprisecommunity.com/greenforum)
- Green Certification management system (www.enterprisecommunity.com/greenportal)
- New Markets Tax Credit: operations management system
- Enterprise Resource Center (www.enterprisecommunity.com/resources)
- Mortgage: Opportunity and pipeline management and CRM
- Enterprise operational reporting (Knowledge, Information & Strategy)
- Portals: Financial/Reporting portal; Investor Intranet (secure portal)
- Fund Raising & Donor Management system (replaces Raiser’s Edge)
- Mortgage Resolution Fund: operations management system
- Remedy/Force: for our IT Helpdesk
- LIHTC/Syndication management: over 20 integrated applications
Enterprise: Case Study Profile - 1

Scope:
- IT modernization; Organization-wide; all business units
- Out-of-scope: ERP/Financials; Financial Modeling; HRIS; BI

Project Duration:
- 2.5 years (and counting)

4 Pillars of the IT modernization strategy:

Benefits already realized:
- Very minimal data center impact (goal: shrink the data center)
- 4 – 8 times faster; at up-to 90% savings compared to traditional
- Architecturally compliant, integrated systems
- Very high level of User adoption
- Increased operational efficiencies (reduction in manual processes)
- Improved visibility, reporting and dashboards
- Increased collaboration

Future Potential:
- Portals/Communities
- Content management and delivery
- 3rd party services and managed applications

Challenges:
- Dealing with the increased internal demand
- Limited availability of skilled resources
- Application Lifecycle Management (ALM)
Snapshot of functionality of our Loan Fund App

- Manage Funder (Capital, Donations, Grants) opportunities and information
- Manage Borrower opportunities and information
- Help match covenants & conditions
- Manage the distribution of funds/loans
- Enable oversight and reporting
- Manage accounts and contact information
- Enable management of related documents
- Enable Risk management and oversight functions
- Track social impact metrics
- Enable Reporting via Portals and Dashboards (portfolio and loans)
- Integrate with a loan management system

Key Takeaways

- But, don’t lose sight of the basics: architecture, data model, SDLC, etc.
- Staff your team with developers who believe in the vision, who like Cloud-based technologies and are enthusiastic about the potential
- Find a good partner/consultant; ensure key architecture and development lead roles are filled
- Start small, prototype, learn, and then build on that success and grow
- If migration to the Cloud is your goal then, a sound Integration strategy and platform is key to establishing Salesforce as an enterprise platform - do this as early as possible
- We use Dell Boomi for integration - great all purpose integration tool
- Portals (Communities) are great; easy to setup
- Chatter is a powerful tool; try it
- The savings are real: both in cost and time; and the results are much better
- This stuff REALLY works
- Finally – we really have a shot at “better, faster, cheaper”
Salesforce.com Solutions for CDFIs

Andrew Schlack, Calvert Foundation
October 17, 2013

Time for Change (2012)

- Portfolio growth led to quick rise in number of borrowers
  - 200 individual spreadsheets as of 2011
  - Multiple files, multiple locations
  - Huge inefficiencies, lots of manual work
  - Paper packages received for 198 borrowers as of 2011

- Lack of data integrity
  - Too many cooks, too many recipes
Starting Point: As of 12/31/12

Goals: Current/Future State
Sample Dashboards
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