

Automated Document Management for Philanthropic Investment Manager

Align Impact



LOCATION

Santa Monica, CA



EMPLOYEES

1 - 10



INDUSTRY

Management and Investments

Challenges

- Needed to push information from their existing Orion Platform to Salesforce
- Lacked ability to collect information from Contacts and Opportunities

Solutions

- **Salesforce Products Deployed:** Sales Cloud and AppExchange
- Used custom Account Button to filter through information on Orion and push to Salesforce.
- Box.com AppExchange product was used to capture information
- Created Record Types to store information

Technology Replaced With Salesforce

- No technology

Founded in 2015, Align Impact operates in the ever-growing landscape of impact investments for the express purpose of finding options in each asset category that best match their clientele's personal values and goals. Because they do not sell products or manage their own stock or bond portfolios, this allows Align to objectively evaluate both the social and financial merits of each separate account manager, mutual fund, ETF, real estate investment, and private equity fund, rather than trying to assert their own financial and asset investment agenda.

Align needed a way to take the information that they were gathering using an Orion platform and have it stream through their Salesforce® platform and into 4 new record types that could collect information and then direct it into these newly created Salesforce integration categories. They also needed a way to collect information from Contacts and Opportunities. Cloud Creations built up a "Custom Account Button" where the information from Aligns Orion platform could be filtered through and into their Salesforce® platform. Also, a "Box.com" AppExchange product was integrated and configured so that Alpine could also capture information at the Contact and Opportunity level. With the ability for the information to be gathered by these Salesforce integrations and populated into

Results

- Align Impact can now capture critical information at the Contacts and Opportunities level
- Captured information is streamed into four field categories in Salesforce

the 4 Record Types: Client, Philanthropy, Investment, and Vendor, Align was able to stream this information into their newly created Salesforce® platform. The solution that Align was seeking was now in their hands, thanks to the work of Cloud Creations using Salesforce® integrations and applications.

Custom Button on Accounts to Open Orion Screenshot

Action	Opportunity Name	Entity Name ↑	Assets	Close Date	Stage	Probability (%)	Type	Relation to Entity	Owner Full Name
Edit Del +	Marvin Trust Align...			4/30/2016	Presentation	50	AUM		Kenning, Jenn
Edit Del +	Heifer Internationa...		\$74,000,000.00	2/28/2016	Closed Lost	0	AUM		Kenning, Jenn
Edit Del +	Michael Grunwald...		\$0.00	8/30/2016	Presentation	25	AUM		Kenning, Jenn
Edit Del +	Yaconi Family - Ali...		\$20,000,000.00	9/30/2016	Presentation	10	AUM		Kenning, Jenn
Edit Del +	Jason and Benji F...			9/30/2016	Presentation	75	Strategy		Kenning, Jenn
Edit Del +	Michael Smith Alig...			11/30/2016	Presentation	50	Strategy		Kenning, Jenn
Edit Del +	Grunwald, Michael...		\$0.00	12/31/2016	Presentation	25	Strategy		Kenning, Jenn
Edit Del +	Yaconi Family - Align...			12/31/2016	Presentation	10	Strategy		Kenning, Jenn
Edit Del +	Matter Family Office...			3/31/2016	Presentation	50	Strategy		Kenning, Jenn
Edit Del +	Gray Matters Capital...			9/22/2016	Closed Won	100	Strategy		Kenning, Jenn
Edit Del +	Leigh Bantivoglio Ali...			10/31/2016	Presentation	50	Strategy		Kenning, Jenn
Edit Del +	Andy Reed Align Str...			11/30/2016	Presentation	50	Retainer		Kenning, Jenn
Edit Del +	Noa Maoz Align Strat...			12/30/2016	Presentation	50	Strategy		Kenning, Jenn
Edit Del +	Andy Reed Align Ret...			12/30/2016	Presentation	50	Retainer		Kenning, Jenn
Edit Del +	Melton Foundation Al...			12/31/2016	Presentation	50	Strategy		Kenning, Jenn
Edit Del +	Semillero Ventures A...			3/30/2017	Presentation	50	Strategy		Kenning, Jenn