



CLIENT PROFILE



Hum Capital's funding platform pairs growth companies with investors and lenders to make funding equitable, efficient and accessible.

INDUSTRY

Financial Services

PRODUCTS

Sales Cloud, Experience Cloud

SERVICES

Outsourced Admin



Michael Slawson, Head of Growth



www.humcapital.com

WHAT THEY NEEDED

Hum needed to streamline the process of syndicating deals between investors and capital seeking companies. The process is complex and involves handing the deal off from team to team, and meeting specific requirements along the way. They also wanted to integrate salesforce with their platform, improve their internal meetings, aggregate data from custom child objects to opportunities, take notes on deals, and have a user manual for new and existing employees.

HOW WE SOLVD IT

SOLVD met with the stakeholders at Hum and diagrammed current processes and then designed a new system to condense their existing sales process into a simple set of validation steps that could be done in the order their reps needed and with room for exceptions and edge cases. SOLVD set up an ownership model to make sure the right deals were showing up for the right users at the right time. SOLVD'S team implemented Salesforce notes and Activity Tracking and provided training so that users could have all their notes in the right place. SOLVD also set up the data model for their internal team to build out an integration with their product platform, configured rollups for aggregated data at a glance, and wrote a user manual to help drive user adoption.

WHAT THEY SAID

"Loved working with SOLVD :)" - Michael Slawson

