



## 100% Digital Loan Management For Open Road Impact

 **Industry:**  
Nonprofit

 **Customer Since:**  
2024

 **Products:**  
Enterprise Suite

 **Features:**  
Portals, Forms, eSign, Flow

### COMPANY BACKGROUND

[Open Road Impact](#) is an impact investing organization, originally founded in 2012, and incorporated as a 501(c)(3) nonprofit in 2024.

The organization provides bridge loans and other financial products to impact-first companies globally, helping mission-driven organizations access capital and bridge funding gaps.

### OPEN ROAD IMPACT'S CHALLENGE

Open Road managed its loan lifecycle across Word documents, email, spreadsheets, and manual handoffs, with no standardized process across inquiry, application, and servicing stages.

A previous portal required account creation before submission, causing early drop-off. With no pre-screening in place, ineligible inquiries regularly consumed staff time.

Due diligence documents were tracked through email, filed manually into Google Drive, and financial scoring was completed in spreadsheets with no early visibility into deal quality.

### TITAN'S SOLUTION

Open Road deployed [Titan Experience Studio](#) to manage the full loan lifecycle inside Salesforce.

A public inquiry portal with conditional pre-screening filters ineligible applicants before they reach the full inquiry form.

Submitted inquiries automatically create lead records in Salesforce, and financial information directly inside the CRM.

Eligible applicants progress to a dedicated portal for loan signing, submitting documentation, and supporting files.

All loan documentation and term sheets are generated, sent, and signed through an eSignature process connected directly to Salesforce.



## KEY RESULTS

- ✓ **100% Digital Loan Management:** Titan replaced inconsistent, manual processes with a structured lifecycle across inquiry, due diligence, pre-disbursement, and loan signing inside Salesforce.
- ✓ **Reduced Inquiry Drop-Off:** Removing the account creation requirement from the previous portal increased completed submissions by reducing abandonment at the first stage.
- ✓ **Ineligible Inquiries Prevented from Reaching Salesforce:** Pre-screen logic filters out ineligible applicants before they reach the inquiry form, reducing staff time spent assessing and declining submissions.
- ✓ **Eliminated Manual File Handling:** Files submitted through the portal connect directly to Salesforce and Google Drive, with due diligence items automatically marked as received.
- ✓ **Replaced Email-Based Submission:** Applicants complete inquiries, upload documents, provide due diligence information, and sign loan documentation through a single portal.
- ✓ **Automated Financial Scoring:** Financial information submitted at inquiry now triggers automated scoring inside Salesforce, replacing manual spreadsheets and giving the team earlier visibility into deal quality.
- ✓ **Greater Visibility Into Applicant Activity:** Internal projects built on Titan track portal performance and applicant behavior, giving staff deeper visibility into the lending experience and supporting ongoing process improvement.

*"Titan is great if you need an accessible way to capture complicated data points through an external portal." Joe Leszewski, Director of Operations and Finance at Open Road Impact*