



“ Since March 15, 2020, we have administered 15 emergency programs and deployed \$396 million to small business owners who desperately needed that funding to stay afloat during the pandemic. Nearly all of that has been back-ended by Smartsheet.

Brad McConnell, CEO, Allies for Community Business

## Allies for Community Business scales to meet 10 times the funding demand with Smartsheet

Allies for Community Business (A4CB) supports small businesses in Illinois and Indiana by connecting them with capital, coaching, and collaborative services. This includes access to grant and loan funds, individual and group coaching, and licensing and procurement services. Smartsheet is the platform that enables A4CB to manage the process from initial application to payment of funds, while ensuring security and data integrity, even as the level of funding grew by a factor of 10 in just one year.

“Our view is that if we strengthen small businesses, we’ll strengthen communities,” says Brad McConnell, CEO of Allies for Community Business. “We provided services to approximately 1,300 small businesses in 2019, and we helped over 37,000 small businesses in 2020. Nearly all of that has been back-ended by Smartsheet.”

### Situation:

McConnell leads a team that provides support and outreach for Black and Hispanic, women, low-income, and other traditionally underserved entrepreneurs. A4CB works with a variety of public and private funding partners to provide as much grant funding as possible, as well as business loans in smaller amounts not normally serviced by banks, with flexible credit terms.

To support these efforts, the organization relies on thoughtful deployment of technology. McConnell says that before adopting Smartsheet, A4CB used a combination of stand-alone spreadsheets, project management platforms, and other resources such as email and paper. The challenge of running one funding program with these disconnected tools pushed him to look for a single platform that could integrate the process from start to finish while protecting data integrity and improving efficiency.

### Company

Allies for Community Business

### Industry

Nonprofit

### Company Size

Small (1-49 employees)

### Customer Profile

Allies for Community Business believes that entrepreneurs from any background can start and grow businesses that create wealth for their families and communities. A4CB provides the capital, coaching, and collaboration entrepreneurs need to grow great businesses in their communities.

### Website

[a4cb.org](http://a4cb.org)

### Business Situation

Allies for Community Business wanted to digitize its small-business funding process while ensuring data integrity and security.

### Solution

Allies for Community Business uses Smartsheet to integrate program creation, applications, evaluations, payment, and reporting to funding partners, meeting 10 times the demand with improved efficiency.

### Benefits

- **A single platform for program administration, execution and reporting** that replaces disconnected paper-based processes
- **Data integrity and security** that reduces risk and supports the organization’s fiduciary duties
- **Improved efficiency** to meet 10 times the funding demand
- **Detailed data reporting and visualization** that prompts funding partners to ask for more



## Solution:

A4CB uses Smartsheet to structure the business-funding process from the earliest point of partnering with a funding partner all the way to delivering funds to a business.

“Before I took this job, I worked on a project at City Hall in Chicago where Smartsheet was the tool we were using to organize a massive documentation audit,” McConnell says.

“Separately, our director of strategy and operations, Isabel Velez Diez, was experimenting with several platforms and found Smartsheet to be the most valuable to our needs. She started to push our organization to consolidate both our program administration, outward bound to clients, and also the internal management that we have to do onto a single platform — Smartsheet.”

## Benefits:

Smartsheet helps Allies for Community Business securely and reliably connect more than 37,000 small businesses with funding, coaching, and collaboration to strengthen their communities.

### A solution to run programs from initial design to final funding:

After collaborating with an organization such as a city policy office or a private granting organization to establish goals and criteria, McConnell and his colleagues create a Smartsheet form that businesses use to apply for the program.

Data from online applications automatically populates a sheet that program administrators can filter and sort to see

who's eligible, who's ineligible, and who requires additional documentation for a decision.

A4CB also uses Smartsheet to manage internal processes. One simple but valuable solution tracks team progress against initiatives. McConnell created a form with drop-downs that leadership team members use to update the status of their work.

The data feeds into a sheet that allows McConnell to easily see what's on time or ahead of schedule and what's in danger of falling behind. This makes it easy to direct work time or resources where they are most needed, then reallocate based on subsequent updates.

### Dashboards for tracking funding across key priorities:

A4CB uses Smartsheet dashboards to share information with funding partners and other stakeholders involved in the program. The bank information provided in applications is securely stored and used to disburse direct deposits into the accounts of the businesses that receive funding.

“For one example, a Chicago hospitality grant, we developed a dashboard based on the Smartsheet operational sheet,” McConnell says. “We can share the ongoing progress for evaluation of eligibility with the city of Chicago policy staff.”

“Most importantly, we were also able to share the distribution of \$10 million across the key priorities the city had established: helping Black and Hispanic-owned businesses, helping women-owned businesses, and helping low-income census tract businesses. We were able to, in real time, update the data visualization that

we were providing to our partners so they had the confidence they required to report to the mayor and the press on who we were serving, why, and in what order.”

That data reporting was even more important than ever in 2020, when the COVID-19 pandemic caused economic upheaval and prompted the development of aid programs to help businesses survive shutdowns and loss of patronage. In 2019, A4CB provided \$3.8 million in loans and grants; in 2020, that figure swelled to \$396 million, with 15 different programs for emergency support alone added to longstanding small-business resources.

### A platform for security and data integrity:

The ability to safeguard bank information is one example of Smartsheet security features that A4CB considers vital to its program management. Beyond the technology protocols, Smartsheet provides risk mitigation for the whole scope of A4CB's work. McConnell says the organization reviewed the platform's security documentation and its structure for integrating, backing up, and managing version control for data.

“Security is part of it, but the integrity of the data is just as important, if not more so,” McConnell says. “If we were inefficiently managing all the data that we're collecting, evaluating, and using for distribution of funds, that puts us and our partners, including the state and the city and others, at significant financial and fiduciary risk that is just intolerable. We couldn't have a situation in which somebody accidentally deleted a spreadsheet, and all this data we captured was lost; that's just



unacceptable in the environment we're working in."

By ensuring data integrity and efficiency, Smartsheet does more than save time and effort in administration of these programs; it's integral to A4CB's ability to provide them in the first place.

"In my mind it's binary rather than sliding-scale," McConnell says. "In the absence of a tool set that allowed us to manage all these extremely complicated and high-pressure, high-visibility programs, we wouldn't have been able to do the programs at all. We wouldn't have had the confidence to volunteer; we didn't think we could handle it. I think we'd have had to pull back from the unacceptable organizational risk that otherwise we would have taken."

**Real-time reporting that makes funding partners ask for more:**

The partners that support A4CB's programs rely on the organization to keep them updated about how businesses are being funded. They're particularly focused on

how well program execution is mapping to their goals of serving target demographic groups, neighborhoods, industries, or other priorities. Smartsheet dashboards allow McConnell and his colleagues to effortlessly provide rich detail about the work being carried out.

"The auto-populating visualization dashboards made a huge difference in how we communicate effectively with our partners," McConnell says. "There are so many parties involved in these emergency programs who were all thirsting for real-time data that we would have spent endless amounts of time trying to provide. With our partners at public entities who are reporting to elected officials on a daily basis, we gave them the link and said, 'Put a shortcut on your desktop and when you need something, click on that.' They found that life-changing."

McConnell says the dashboard reporting has been so successful, partners are clamoring for

more detail. While program confidentiality requirements mean that A4CB can't meet their eagerness to see the complete underlying data in detail, the organization is rethinking how to most effectively present the information that can help funders better meet the needs of the community.

"The publication of the dashboards and the ease with which we can provide that kind of visualized summary data — no surprise — prompted everyone to ask for more," McConnell says.

"That spoke to a real appetite for further opportunities to share real-time data that is structured visually, and the underlying data that sits in support of it. We've been thinking carefully about ways to provide more granular data to our partners in real time than we do at the moment. But these are the right problems to have because it's orders of magnitude better than what our partners have typically expected."

## About Smartsheet

Smartsheet (NYSE:SMAR) is a leading cloud-based platform for work execution, enabling teams and organizations to plan, capture, manage, automate, and report on work at scale, resulting in more efficient processes and better business outcomes. Today over 95,000 customers, including more than 77,000 domain-based customers and over 70 percent of the companies in the Fortune 500, rely on Smartsheet to implement, manage, and automate processes across a broad array of departments and use cases.

To learn more about Smartsheet, visit [www.smartsheet.com](http://www.smartsheet.com).