

CRF INSIGHTS

Find the signal in the noise.

CRF Insights provides community lenders and business support organizations with real-time data and insights about their small business customers. These insights help business coaches and lenders develop tailored advisory services to position their customers for success while significantly improving impact reporting outcomes, making on-time in context recommendations, and enhancing visibility for portfolio managers.



Empower Business Owners with a Free, Dynamic Profile

Provide small business owners with a reusable, dynamic profile that streamlines their access to support. By connecting their bank accounts, transaction data and other services they use, business owners can easily share information about their business with lenders and coaches.



Targeted Business Coaching

Focus on each business owner's specific goals with personalized advice and resources. By understanding the unique needs of each business, you can offer tailored advice and resources that help business owners achieve their goals more efficiently. CRF Insights also tracks progress against goals automatically over time, so you and the businesses you serve know you are staying on track.



Financial Health Monitoring System

A win-win solution for financial institutions and their customers that provides proactive monitoring and support. Our opt-in and fully transparent financial monitoring system offers continuous monitoring of your customers' financial health, providing the opportunity to proactively engage and position your customers for success.



Catalyze Impact Through Intelligent Recommendations

Ground your interventions, policy decisions, and customer interactions in empirical data for targeted, efficient, and effective assistance. Our platform analyzes each business's unique context and journey to suggest the best resources and support strategies, helping you provide the most effective assistance.



Impact Evaluation Made Easy

Evaluate your organization's impact using data already generated through support processes. Gain insights into the effectiveness of your interventions, showcase the value of your organization, and make data-driven decisions to improve your support strategies.

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Partner ROI Calculator

Use this sheet to help you uncover where CRF Insights can help your organization expand impact and save resources.

	Estimated Monthly Costs
Loan Servicing/Portfolio Management Staff Hours	
Impact reporting Staff Hours	
Speedier Decisioning Opportunity to Close More Loans	
Coaching/TA Efficiency & Process Improvement	
Risk of portfolio defaults w/o financial statements	
Total	
	<p>\$2,000/month \$500/month</p>



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