

# Saving Time to Drive Impact

*How to build a business case for CRM investment.*

# Saving Time to Drive Impact

*How to build a **grant funding** case for CRM investment.*

# Abby Guyer

Executive Director, Xcelerate Women



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## Changing the Face of Success in Business

Xcelerate is a transformative community that supports Oregon's women and gender expansive business owners on their journeys to success. Our Business Advising, Peer Mentorship, and Education programs help women overcome systemic inequities to create economic power, build generational wealth, and positively impact their communities.

[www.xceleratewomen.org](http://www.xceleratewomen.org)



# Adrienne Chaillé

Economic Development Manager,  
Washington County Administrative Office





[Home](#) > [County Administrative Office](#)

# Economic Development Program

Washington County's Economic Development Program partners with local business support organizations, cities, and economic development agencies to provide resources for economic opportunity.



## Resources for economic opportunity

A resource directory is a community-led priority identified in partnership with the Washington County Small Business Support Network. The network meets quarterly and is open to all business and workforce support organizations serving businesses and people across the county. Participants are representatives of these partners including community-based organizations, local area and culturally specific chambers of commerce. The group went through an asset mapping process to identify existing resources for small businesses and community and understand what is missing, through the lens of racial equity. Learn more about our [programs and partnerships](#) including how to get involved. More opportunities for small businesses to participate in activities are coming soon.

### Contact Us

**Email**

✉ [economic\\_development@washingtountyor.gov](mailto:economic_development@washingtountyor.gov)

# Agenda

01. Pre-CRM Tech Stack + Processes
  02. Capacity Building Grants
  03. Board Engagement
  04. How We Made Our Case
  05. Selection + Implementation
  06. Outcomes
-

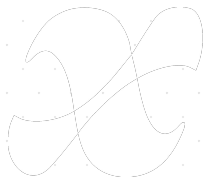
# Pre-CRM Tech Stack + Processes

01



# Google Sheets + Donorbox + Mailchimp aka **FREE**

- Xcelerate grew from serving 70 women in 2019 to 821 women statewide in 2024.
- More impact
- More programs
- More funding sources
- More stakeholder groups
- More data to track, manage, and report
- We had outgrown FREE



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# Example: Business Advising Program

- 1:1 Coaching, Legal Guidance, Mental Wellness Support
  - Prosper Portland IBRN, Prosper Portland Digital Marketing, Business Oregon
  - Geographies, Demographics, Industries, HHI
  - Owner Fees + Coach Invoices
- Intake Form: Google Sheet with 28 columns and 3 tabs for billback tracking
- Pairing Form: Owner + Coach Match
- Coach Report Back Form
- Owner Outcome Survey
- Balance of Hours Available
- Quarterly + Annual Grant Reports
- Xcelerate Annual Impact Report

	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Business Address Zip	Is your business registered	In which County is your	Year of First Sale	Gross Revenue s in 2021	Gross Revenues in 2022	What industry/sec	Business Stage	What is the percent ownership you	How many people do you employ?	How many contracto	Which topics are yo	Request Det
2	87026	Yes	Washington	2009	0	113,000	Food & Bev/Agriculture	Early Stage Growth (\$10	100	0	0	1 Financial Management (j	I currently do
3	87231	Yes	Multnomah	2016	\$700,000	\$700,000	Food & Bev/Agriculture	Early Stage Growth (\$10	100	1	1	2 Financial Management (j	Currently I do
4	87240	Yes	Multnomah	2006	\$100,001-50	\$154,700	51	Health, Wellness & Ser	Early Stage Growth (\$10	100	1	0 Accounting/Bookkeeping	Managing bo
5	87530	Yes	Jackson	2021	48000	100000	Education	Early Stage Growth (\$10	100	1	1	5 Digital Marketing / Webst	Everything is
6	87006	Yes	Clatskanie	2017	68458	41,058	Health, Wellness & Bev	Early Stage Small Busine	100	1	0	0 Loans, Grants and/or Fin	Navigating Ly
7	87212	Yes	Multnomah	2020	0	\$3,427	Professional Services	Early Stage Small Busine	100	1	1	0 Branding/Storytelling, Le	I am working
8	87785	Yes	Deschutes	2021	35,000	100,000	Consumer Products & I	Early Stage Growth (\$1-10	40	0	3	4 Branding/Storytelling, Di	Small Busi-
9	87218	Yes	Clatsop	2016	35,000	30000	Health, Wellness & Rec	Micro Business/Recently	50	0	2	0 Branding/Storytelling, Di	We are a sm
10	87782	Yes	Deschutes	2022	0	10,000	Food & Bev/Agriculture	Micro Business/Recently	40	0	2	0 Capital Raising/Financ	Sales stratg
11	87216	Yes	Multnomah	2021	2000	31,000	Professional Services	Micro Business/Recently	100	1	1	0 Branding/Storytelling, Di	I would like h
13	87001	Yes	Head River	2013	68,000	117,000	Food & Bev/Agriculture	Early Stage Growth (\$10	100	1	1	2 Branding/Storytelling, Le	We have a p
14	87232	Yes	Multnomah	2013	64,000	60,000	Health, Wellness & Bev	(don't know)	100	1	1	5 Legal, Operations/Supp	1. More info
15	87217	Yes	Multnomah	2021	3000	30,000	Professional Services	Micro Business/Recently	100	1	1	0 Branding/Storytelling, Fi	2. Improve Bus
17	709	Yes	Clatskanie	2021	0	67,460	Food & Bev/Agriculture	Early Stage Small Busine	50	0	0	2 Accounting/Bookkeeping	Business plan
18	87012	Yes	Clatskanie	2017	\$250,000	\$400,000	Food & Bev/Agriculture	Mid Stage Growth (\$200	51	0	0	0 Manufacturing or Produc	Increasing a r
19	87005	Yes	Clatskanie	2018	0	0	Construction and Trade	Micro Business/Recently	100%	0	0	5 Digital Marketing / Webst	Fit like help b
20	87783	Yes	Deschutes	2020	8000	10000	Food & Bev/Agriculture	Micro Business/Recently	100%	1	1	2 Manufacturing or Produc	I need custo
21	87204	Yes	Washington	2020	10,000	40,000	Retail	Early Stage Small Busine	100%	1	1	0 Branding/Storytelling, Fi	General busi
22	87381	Yes	Polk County	2021	90000	100000	Professional Services	Early Stage Growth (\$10	100	1	1	0 Accounting/Bookkeeping	I am hoping t
23	87782	Yes	Deschutes	2020	0	30,000	Software and Tech	Micro Business/Recently	100	0	1	2 Website Building / Design	Evaluation or
24	87214	No	Multnomah	2016	0	10,000	Health, Wellness & Ser	Micro Business/Recently	100%	0	0	4 Accounting/Bookkeeping	Mostly financ
25	87210	Yes	Multnomah	2017	204000	228000	Food & Bev/Agriculture	Mid Stage Growth (\$200	100	7	7	0 Accounting/Bookkeeping	Very much in
26	87485	Yes	Lane	2011	\$100,000	\$111,000	Food & Bev/Agriculture	Early Stage Growth (\$1-10	51%	0	2	0 Financial Management (j	How to scale
27	87235	No	Multnomah		0	60,000	Professional Services	Early Stage Small Busine	n/a	n/a	0	5 Financial Management (j	After the busi
28	87480	Yes	Clats	2018	75000	100000	Food & Bev/Agriculture	Early Stage Growth (\$1-10	My husband And I own	1	7	0 Accounting/Bookkeeping	Help, and th
31	87187	Yes	Deschutes	2020	40,000	70,000	Food & Bev/Agriculture	Early Stage Small Busine	50	0	2	0 Accounting/Bookkeeping	Subsidiarilly

	V	W	X	Y	Z	AA	AB	AC	AD	AE	
1	What are your conta	How did you hear about Xcelerate?	Which communities	Which communities	Which pronouns do	What is your average annual household	What is the size of your household	Do you speak a language other than English at	Acknowledgmer	Acknowledgmen	Fe
2	Online Meeting (Zoom, G I have been a member	Asian, Tibetan	Women, Immigrant/Refugee	She/Her/hers	\$50,000 - \$99,999	4	Tibetan	I agree	I agree	Yes	
3	Phone, Online Meeting (Hannah Kullberg at	White	Women	She/Her/hers	\$100,000 - \$149,999	1	No	I agree	I agree	Yes	
4	Phone	Sarah Escal from C	White	Women	She/Her/hers	\$50,000 - \$99,999	2	No	I agree	I agree	No
5	Online Meeting (Zoom, C Google	White	LGBTQ, Women	She/Her/hers	\$50,000 - \$99,999	1	No	I agree	I agree	Yes	
6	Phone, Online Meeting (Jill West, at Business	White	Disabled/Impaired, Immig	She/Her/hers	\$50,000 - \$99,999	3	No	I agree	I agree	No	
7	Phone, Online Meeting (J.A. West)	White	LGBTQ, Women	She/Her/hers	Under \$20,000	1	No	I agree	I agree	No	
8	Online Meeting (Zoom, C Dana Book and I am	White	Disabled/Impaired, Wom	She/Her/hers	\$100,000 - \$149,999	2	No	I agree	I agree	Yes	
9	Online Meeting (Zoom, C Escal email)	White	Disabled/Impaired, LGBT	They/Them/theirs	Under \$20,000	2	No	I agree	I agree	No	
10	Phone, Online Meeting (PETERC)	White	Women	She/Her/hers	\$100,000 - \$149,999	2	No	I agree	I agree	Yes	
11	Online Meeting (Zoom, G Loveland NW	White	Women	She/Her/hers	\$50,000 - \$99,999	3	No	I agree	I agree	No	
13	Online Meeting (Zoom, G GAF r/BUILT	White	Disabled/Impaired, Wom	She/Her/hers	\$150,000 - \$199,999	4	No	I agree	I agree	No	
14	Online Meeting (Zoom, C Juste Service	White	LGBTQ, Women, neurod	She/Her/hers	\$100,000 - \$149,999	3	No	I agree	I agree	No	
15	Phone, Online Meeting (I work as a Coach	White	Women, Working Mother	She/Her/hers	\$70,000 - \$79,999	3	No	I agree	I agree	No	
17	Online Meeting (Zoom, C Instagram	Hispanic/Latinx	Women	She/Her/hers	\$50,000 - \$99,999	4	Spanish	I agree	I agree	Yes	
18	Online Meeting (Zoom, C WA Loveland	Armenian	Women	She/Her/hers	Over \$200,000	2	No	I agree	I agree	Yes	
19	Phone, Online Meeting (Hiliana Penaserra	White	Disabled/Impaired, Singl	She/Her/hers	Under \$20,000	3	No	I agree	I agree	Yes	
20	Online Meeting (Zoom, C CDR Kaitoua Ueno	White	Women	She/Her/hers	\$100,000 - \$149,999	3	No	I agree	I agree	No	
21	Phone, Online Meeting (I sent information for	White	Women	She/Her/hers	\$150,000 - \$199,999	2	No	I agree	I agree	Yes	
22	Phone, Online Meeting (Oregon State Webel	Hispanic/Latinx, Multi-rac	Women, Multi-racial	She/Her/hers	\$150,000 - \$199,999	4	No	I agree	I agree	No	
23	Online Meeting (Zoom, C Refered by Yda	White	Disabled/Impaired, Wom	She/Her/hers	\$40,000 - \$49,999	1	No	I agree	I agree	Yes	
24	Online Meeting (Zoom, C Caitlin Quinn	White	LGBTQ, Single Parent, V	She/Her/hers	Under \$20,000	2	No	I agree	I agree	Yes	
25	Online Meeting (Zoom, C My friend Kate or Ke	White	LGBTQ, Non Binary/Gen	I do not have a pronoun	\$50,000 - \$99,999	2	No	I agree	I agree	No	
26	Phone, Online Meeting (Hannah Kullberg	White	Women	She/Her/hers	Under \$20,000	1	No	I agree	I agree	No	
27	Online Meeting (Zoom, G They contacted me	Black/African American	Non Binary/Gender Fluo	They/Them/theirs	\$100,000 - \$149,999	1	No	I agree	I agree	No	
28	Phone, Online Meeting (Women in business	White	Women	She/Her/hers	Under \$20,000	4	No	I agree	I agree	Yes	
31	Phone, Online Meeting (Colosseo referral)	White	Women	She/Her/hers	\$40,000 - \$49,999	2	No	I agree	I agree	No	

	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Industry	Race	Other	Fee Waive?	Coach	Scope	Hrs Alloc	Hrs Used	Hrs Zero	Dig Mark ?	Coaching Complete ?	Survey Sent	Survey Complete
2	Consumer Products/Maker	Hispanic/Latino		DM	Ashley Gladstone	Storytelling, May	1	1	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Consumer Products/Maker	Black/African American			Teresa Hill	Origin story crea	2	0	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Food/Bever/CPG	Multi-racial (please sele			Karen McKen	Overview of role	1	1	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Food/Bever/CPG	White			Leslie Dixon	Wholesale Oper	2.0	0	2.0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	Food/Bever/CPG	Asian	Immigrant/Refug		Conita Vanders	Bookkeeping sy	2	2	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Health, Wellness & Beauty	White	LGBTQ, Disabi		Conita Vanders	December retro	1	1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	Health, Wellness & Beauty	Asian	LGBTQ, woman	DM	Ashley Gladstone	SEO and Analyt	3	2.5	0.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Hospitality & Service	White			Leslie Dixon	Questions about	3	0	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	Professional Services	White	LGBTQ, woman		Karen McKen	Set up CRM, set	1	1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11	Retail	White/Indigenous			Scott Shaw	Exit Strategy: Di	2	0	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Food/Bever/CPG	Hispanic/Latino		DM	Jan McFarland	Best practices fo	3	0	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	Consumer Products/Maker	Black/African American	Immigrant/Refug	DM	Ashley Gladstone	set up Google S	2	2	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14	Food/Bever/CPG	Multi-racial (please sele			Leslie Dixon	Annual Sales Pl	3	3	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15	Food/Bever/CPG	Multi-racial (please sele			Leslie Dixon	strategic plannin	3.5	3.5	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
16	Food/Bever/CPG	White			Lari Spencer	Model Vendor Mo	2	2	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	Food/Bever/CPG	Multi-racial (please sele			Conita Vanders	Profit&Loss Rev	3	3	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
18	Retail	Hispanic/Latino			Ashley Gladstone	Google Analytic	1.5	1.5	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19	Retail	Black/African American			Conita Vanders	Real positions fo	1.5	1.5	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
20	Retail	Black/African American			Conita Vanders	Monthly Forecast	3	2	1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
21	Health, Wellness & Beauty	Black/African American			David Hill	Review OODS b	1	1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
22	Health, Wellness & Beauty	Black/African American			Jan McFarland	6 month digital m	3	3	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
23	Hospitality & Service	White			Bryan Baker	Selecting an HR	1	1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
24	Retail	Multi-racial (please sele			Aminda Desece	Public speaking	3	3	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
25	Food/Bever/CPG	Black/African American			Hannah Kullberg	optimizing her ope	1.5	1.5	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
26	Food/Bever/CPG	Black/African American			Shannon Oliver	Researching and	2	1	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
27	Professional Services	White	LGBTQ, woman		Jan McFarland	Business planin	3	2	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
28	Consumer Products/Maker	Black/African American	LGBTQ, Disabi		Markana Duvet	launching business	2	1	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
29	Consumer Products/Maker	White			Tanya Harrell	Prepares for scho	3	1	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

*We're not here to sell you a CRM...  
we're here to help you secure grant  
funding so you can afford one.*

# Capacity Building Grants



02

# Capacity Building Grants: Washington County

- Strengthen the receiving organization
- Enhance existing programs or support development of new programs or services
- Demonstrate how these enhancements will advance the mission
  - Commissioning a feasibility study for new program design or enhanced program development.
  - Generating an action, financial, or strategic plan to guide programs moving forward.
  - Program development to build out new or to strengthen existing services.
  - Professional development opportunities for technical service staff such as purchasing or developing curriculum for technical service experts. This could include leadership training or coaching.
  - Technology to support in program implementation such as data evaluation or client relationship management software.



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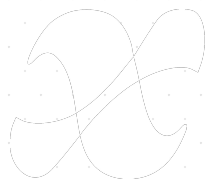


# Board Engagement

03

# Data Tech Committee

- All volunteer working board & committees
- Walk thru current process: Google Sheets
- Staff “Wish List” of features: Must Have, Nice to Have, Bonus (ie. Automations)
- Program Management first, Marketing and Donor Prospecting tool second
- Committee led research process
  - Identified 160+ features
  - Compared 3-4 platforms
  - Low, Med, High cost
  - Scalability for present needs and future growth



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### Data/Automation + CRM Wishlist

Working document to log all of our CRM hopes and dreams...

Who	Main Purpose/Interaction	Wants + Needs
Abby	<ul style="list-style-type: none"> <li>Searchable and segmentable database of individual profiles for owners, coaches, donors, partners, prospects</li> <li>Contact record/capture of each engagement with an owner, coach, donor, partner, prospect</li> <li>Reporting, ie. dashboard views of service interactions by program (BA, PMGs, Educ, Nav Services), by demographic, industry, owner, coach etc. (searchable, sliceable, measurable data)</li> <li>Simplification of processes via automated workflows</li> </ul>	<ul style="list-style-type: none"> <li>Record of all the services owners have received over time (BA, PMGs, Educ, Nav Services) and direct links to survey results/outcomes</li> <li>Record of all the coaches an owner has been matched with over time and direct links to survey results/outcomes</li> <li>Links to owner goal setting sheets and other related materials</li> <li>Create owner profiles without having to make separate PDFs including vulnerability index and any fee for service details</li> <li>Create coach profiles including commercial rate, XCW rate, and auto gen in-kind total (might be a QBO function vs CRM?)</li> <li>Ability for coaches to enter outcome sheets directly into CRM</li> <li>QBO integration?</li> <li>Asana integration to recommend coaches based on keywords workflow</li> <li>Ability to designate funding source for owners (ie. Prosper, Business OR, general)?</li> <li>Ability to generate service/impact reports (by month, quarter, year over year)</li> <li>Email marketing integration with Mailchimp</li> <li>Optional prospecting tools for donor research and development</li> </ul>

Matea	<ul style="list-style-type: none"> <li><b>BA Profiles</b></li> <li>When we request coaches for BA, we send them a profile overview of the owner.</li> <li>Information primarily comes from the request form, but includes my assessment from intake and scope of work for pairing.</li> </ul>	<ul style="list-style-type: none"> <li>Be able to export BA form response answers + assessment without copy pasting into new document to create BA profiles</li> <li>Potentially skip export process if we can just give coaches a limited view of owner profiles on basis of sharing the link</li> </ul>
	<ul style="list-style-type: none"> <li><b>BA Billing</b></li> <li>In BA Tracker 2023, after pairing, entering owner billing information into BA tab.</li> <li>Triggers Larissa to invoice owners for</li> </ul>	<ul style="list-style-type: none"> <li>eliminate scrolling/margin of error.</li> <li>if/then trigger for "IF coach pairing added + ("fee waive" = null ) = add to billing \$25 admin fee"</li> <li>A single, easy to scan page where previous</li> </ul>

	<p>admin fee</p> <ul style="list-style-type: none"> <li>Some owners waive fee. Only place this is tracked is the original BA form response tab</li> </ul>	<p>coach pairings are tracked over many years because we charge per coach pairing.</p>
	<ul style="list-style-type: none"> <li>Have full owner history of coaching on one page, including links to coach feedback surveys</li> </ul>	<ul style="list-style-type: none"> <li>Helps me to understand their progress, whether a coach perhaps didn't work for them or not.</li> </ul>
	<ul style="list-style-type: none"> <li><b>BA Project Mgmt</b></li> <li>tracking owners through service pipeline. Single record of meeting notes.</li> <li>Very important to me!</li> </ul>	<ul style="list-style-type: none"> <li>Kanban board view with "cards" that preview certain things I need to know at a top level (am I waiting on someone else to provide something)</li> <li>Automation triggered by owner completing</li> </ul>

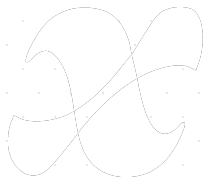
2	Access Controls/Permissions	Yes	Yes	Yes	Yes
3	Accounting Integration	Yes (\$ Ops Hub Only)	No	Yes	Yes
4	ACH Payment Processing	Yes (Native)	Yes (Integration)	No	Yes
5	Activity Dashboard	Yes	Yes	Yes	Yes
6	Activity Tracking	Yes	Yes	Yes	Yes
7	Ad hoc Reporting	Yes	Yes	Yes	Yes
8	Additional apps/integrations*****	Yes	Some	Yes	Yes
9	AI Content Creation	Yes	No	No	Yes
10	Alerts/Notifications	Yes	Yes	Yes	Yes
11	Alumni Management	Yes	Yes	Yes	No
12	API	Yes	No	Yes	Yes
13	Application Management	Yes	Yes	No	Yes
14	Attendance Management	Yes	Yes	Yes	Yes
15	Auction Management	No (yes with integration)	No	Yes	No
16	Auto-responders	Yes (Marketing Hub)	No	No	Yes
17	Bid Management for auctions	No (yes with integration)	No	Yes	No
18	Billing & Invoicing	No (Yes Ops Hub \$)	No	Yes: Integrates w/ QBO	Yes: Integrates w/ QBO
19	Board/Committee Management Tools	Yes	Yes	No	Yes
20	Budget Control tools	Yes (For Individual Campaigns, marketing hub)	No (yes with integration)	No	Yes
21	Budget Forecast Tools	Yes (sales hub, forecast revenue "deals")	No (yes with integration)	No	Yes: Integrates w/ QBO
22	Buy Now Option for auctions	No (yes with integration)	No (yes with integration)	Yes	No
23	Campaign Analytics	Yes	No (External Integration Needed)	Yes	Yes
24	Campaign Management	Yes	No (External Integration Needed)	Yes	Yes
25	Campaign Planning	Yes	No (External Integration Needed)	No	Yes
26	Campaign Scheduling	Yes (Marketing Hub)	No (External Integration Needed)	No	Yes
27	Campaign Segmentation	Yes	Yes	No	Yes
28	CAN SPAM Compliance	Yes	Yes	No	Yes
29	Categorization/Grouping****	Yes (although terminology is weird)	Yes	No	Yes
30	Click Tracking	Yes (marketing Hub)	No	Yes	Yes

# Making Our Case

04

# Narrative

- “Good data amplifies impact and strengthens good governance.”
- Modernize our IT solution to better use the data we have to garner actionable, scalable insights to support the resilience of women-owned businesses
- Track owner data across multiple programs/activities; more easily generate reports for multiple stakeholder types; link data from multiple sources/systems to track both process and individual programmatic activities
- Board Committee engagement in process and recommended solution



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# Narrative

- Staff time also equals budget
  - ~100 hours/month on manual data collection, reporting, management
  - Projected 30% savings in staff time and budget to invest in serving more women
  - Individual testimonials: ability to be effective using existing tools

*“I spend a lot of time copy pasting information into different systems, and there’s a certain amount of human error built into that process. I care deeply about our owners’ experiences, and it can be stressful to know a small mistake could mean an unexpected bill for them, confusion about the process, or cause a delay in receiving services. I long for a simpler and more comprehensive system so that I can feel more confident about the work I do and have more time freed up to serve more owners on a weekly basis.”*

# Project Design + Timelines

- 12 month project schedule
- **Phase 1:** formally initiate project planning, refine feature requirements identified by key personnel, conduct platform demos, gather vendor estimates, select platform.
- **Phase 2:** system implementation and staff training
- **Phase 3:** launch pilot, full system launch, org-wide team training, sunset current Google Sheet systems to increase compliance.



# Outcomes + Impacts

- Increase Services Capacity & Staff Satisfaction
  - 25-30% more WA County direct service in the next two years
  - Increase staff satisfaction - modern tools they need to be effective in their roles
- Reporting & Actionable Insights
  - Track owner data across multiple programs, budgets, activities
  - Easily generate reports + link data across multiple programs, sources, systems
  - Anticipate the specific needs, challenges, and gains of women business owners so we can refine current programs, identify partnership opportunities, design future programs
- Equity & Inclusion
  - Oregon's second largest and one of its most diverse counties

# Selection + Implementation

05

# Selection + Implementation

- Hubspot
  - 40% nonprofit discount
  - Marketing Hub Pro: 3 Core Seats, 2K Marketing Contacts
  - Sales Hub Enterprise: 2 Sales Seats
  - Operations Hub Starter: 1 Core Seat
- Integrations
  - FundraiseUp
  - Survey Monkey
  - No longer need Mailchimp or Asana

# Selection + Implementation

- Causemic
  - Program tracking
  - Survey automation
  - Donor management
  - Data migration
  - Project management, training, & documentation
  
- Total Budget: 25K

# Outcomes

06

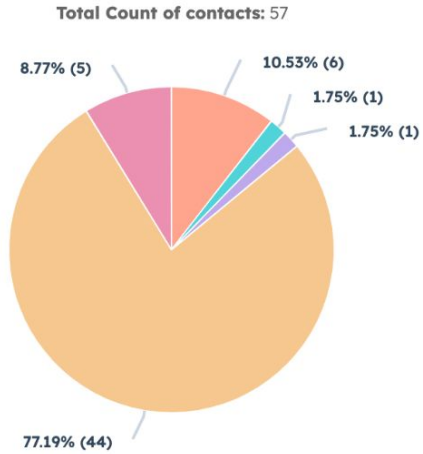
# Outcomes

- Hubspot fully implemented, all Google Sheets sunsetted along with Mailchimp & Asana
- Email marketing through Hubspot vs. Mailchimp
- Efficiencies: invoice management, survey and report back automation, “at once” dashboards
- SOPs/Internal Training Manual for cross-training and continuity of services in progress
- Year End Reporting & Data Compilation for 2024 Annual Impact Report

### YTD Business Advising Owners by Registered County

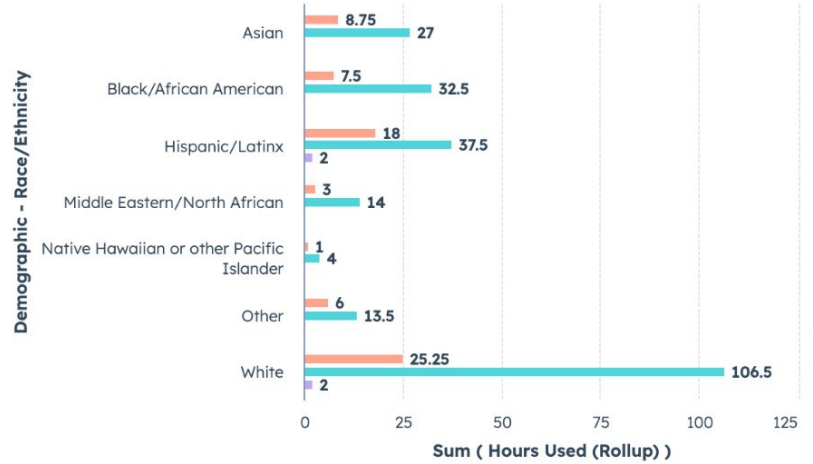
● Clackamas County 
 ● Curry County 
 ● Hood River County 
 ● Multnomah County

▲ 1/2 ▼



### YTD Business Advising Hours by Race/Ethnicity

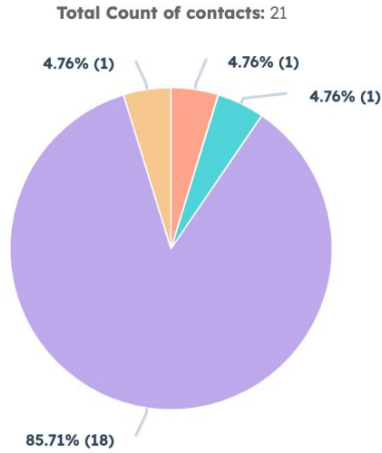
■ Sum ( Hours Used (Rollup) ) 
 ■ Sum ( Hours Allocated ) 
 ■ Sum ( Hours Zerod )



### YTD PMG Owners by Registered County

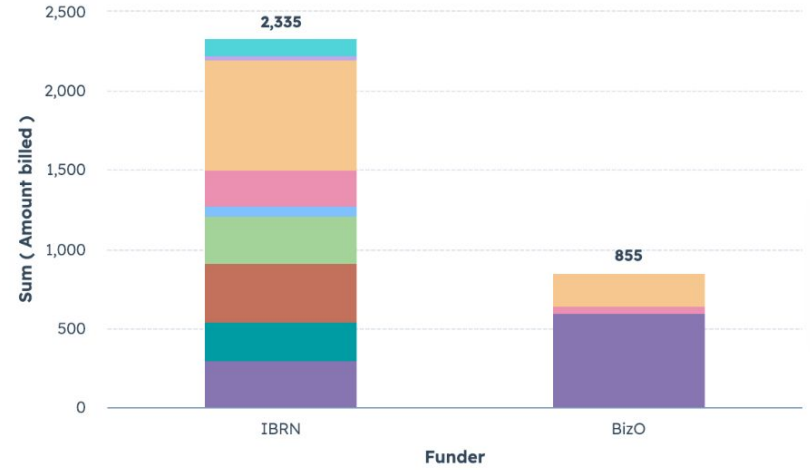
● Clackamas County ● Deschutes County ● Multnomah County

▲ 1/2 ▼



### Program Fees by Funder (BA + PMG)

● 0 ● 15 ● 30 ● 35 ● 45 ● 60 ● 75 ● 125 ● 240 ● 300





+ Quick filters

☰ Advanced filters

Manage dashboards

Assigned: Everyone can edit

Coaches with Hours Allocated YTD ⓘ

FIRST NAME ▾	LAST NAME ▾	YTD HOURS ALLOCATED ▾
Ashlan	Glazier-Anderson	24.5
Gloria	Coleman	21.5
Lizzy	FitzGerald	18
Jen	McFarland	16.5
Viridiana	Ponce	13.5
Alissa	Leeper	11.5
Claudia	Estrada	10
Katerina	Agronik	8
Rosemary	Brensen	8
Rational Unicorn	(No value)	8

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Coaches with 0 Hours Allocated YTD ⓘ

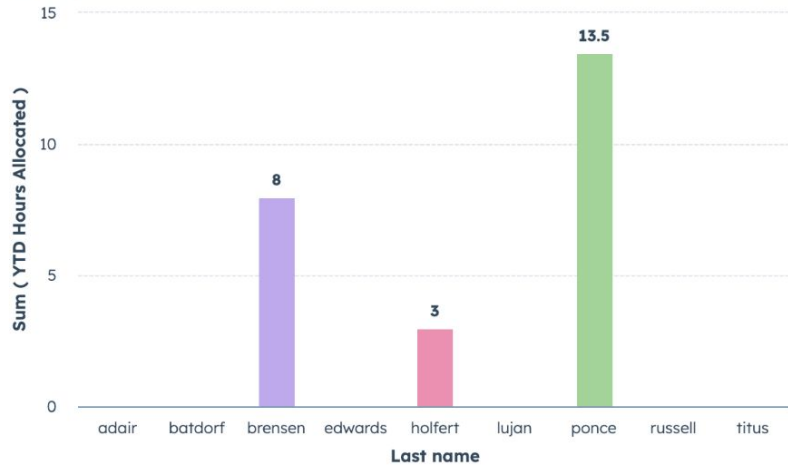
FIRST NAME ▲	LAST NAME ▾	YTD HOURS ALLOCATED ▾
Alex	Batdorf	(No value)
Alison	Sokol Blosser	(No value)
Anna	Madill	(No value)
Beth	Adair	(No value)
Carla	Titus	(No value)
Dr. Elizabeth	Martin	(No value)
Holly	Lujan	(No value)
Jackie	Seto	(No value)
Kim	Allchurch-Flick	(No value)
Laura	Haught	(No value)

< Prev **1** 2 3 Next > 10 rows per page ▾

### Capital Readiness Coaching Hours 2025

● adair ● batdorf ● brensen ● edwards ● holfert ● lujan ● ponce

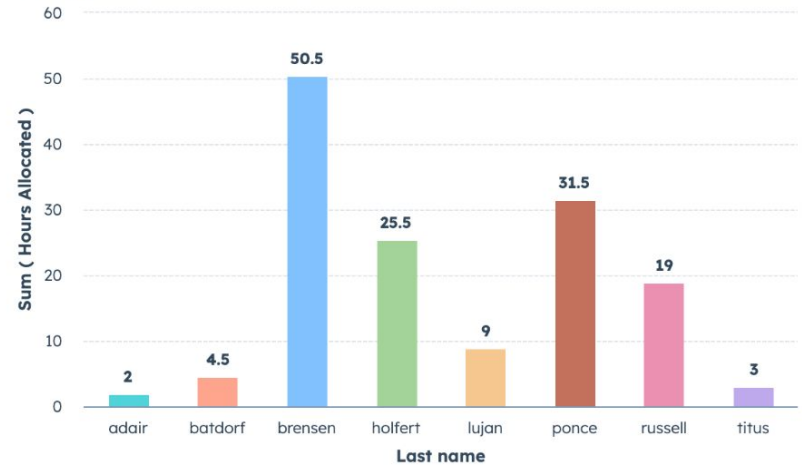
▲ 1/2 ▼



### Capital Readiness Coaching Hours 2024

● alex ● beth ● carla ● holly ● michelle ● rosemary ● vanessa

▲ 1/2 ▼



*821 women and gender expansive entrepreneurs in 15 Oregon counties.*

# Big Picture: Program Stats

In 2024, Xcelerate provided our highest impact direct services to **222** women and gender expansive-owned businesses with **\$25.4M** in gross revenues and collectively employing **575** Oregonians. We also delivered educational workshops, panels, and events to **599** community members across the State of Oregon, for a total of **1,411** service interactions.



## 177 Owners

Received 504.5 hours of Business Advising services, a complementary trio of one-on-one programs that includes expert Coaching, Legal Guidance, and Mental Wellness Support.

## \$272,211

Average gross revenues reported by owners during on-boarding process.

## 45 Participants

Supported each other with 378 hours of facilitated Peer Mentorship, small groups of 4-8 business owners curated by growth stage and focused on goal setting, accountability, and problem solving in-community.

## 5.1 Years

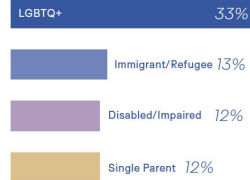
Average number of years in business. We support owners with a product or service that's been on the market for at least one year and is already generating revenue or otherwise demonstrating traction.

## 599 Attendees

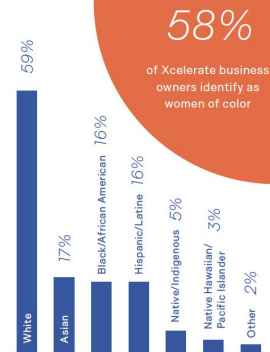
Joined virtual and in-person Educational Workshops, Panel Conversations, & Events.

## 71%

Low to Moderate Income individuals served. 51% of owners reported income below 70.9K, or 80% of Oregon's median income of \$88,740 for 2.49 individuals.



Communities identified reflect owner-responses on Business Advising & Peer Mentor Group intake forms.



### RACE/ETHNICITY

Demographics reflect owner-responses on Business Advising & Peer Mentor Group intake forms. Owners may select multiple responses.

# Demographics

Business Owner Background

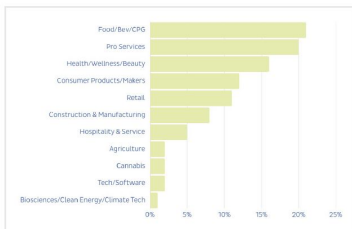
# Business Advising

*Replacing barriers with open doors.*

Xcelerate's highest impact direct services are also our most accessible. Business Advising is a complementary trio of one-on-one programs - Coaching, Legal Guidance, and Mental Wellness Support - that addresses specific internal and external barriers to growth. Owners pay only a small administrative fee that is waived on request if it presents a financial hardship. We're pleased to introduce you to just a few of the business owners from across Oregon who participated in these programs in 2024. Read their full interviews at:

[xceleratewomen.org/news-and-events](https://xceleratewomen.org/news-and-events)

## BUSINESS SECTORS



## 4.6 Hours

Average number of Business Advising hours allocated to each owner

## \$1041

Market value of expert guidance received by owners

## 100%

Owners who would recommend Business Advising services to women in their networks

## 4.7 out of 5

Owner score for Coach Helpfulness on Business Advising outcome surveys



## Our Coaches

Xcelerate coaches bring a diversity of lived experience and industry expertise to categories like Admin & Operations, Sales & Marketing, Capital Readiness, and Strategy & Mindset. 96% of Xcelerate coaches are paid for their time (4% volunteer) and 96% are women and/or nonbinary, creating a circular economy of women supporting women.

# Statewide Impact

*Participation and Engagement*

In 2024, Xcelerate increased statewide outreach, resources, and positive outcomes for women-owned businesses in 15 counties, including Washington County, Oregon's second largest and most diverse county. Our thanks to Business Oregon and Oregon Community Foundation for their generous and continued investment in Xcelerate's statewide growth and to Coos, Curry, and Douglas County Business Development (CCD) Women in Business for their ongoing partnership and collaboration.

## 32%

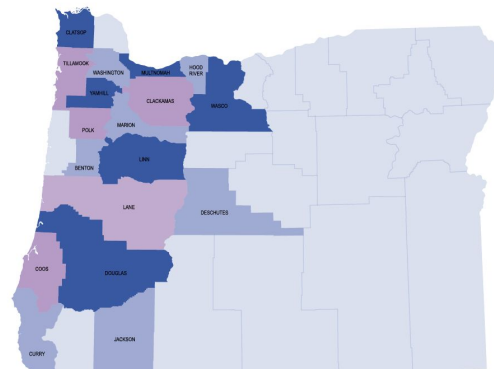
Businesses served outside of the Portland Metro area

## 77%

Businesses served in Rural communities

## TOP 15 OREGON COUNTIES SERVED

- Benton <1%
- Clackamas 4%
- Coos 8%
- Curry 7%
- Deschutes 1%
- Douglas 11%
- Hood River <1%
- Jackson 1%
- Lane 1%
- Marion 2%
- Multnomah 58%
- Polk <1%
- Wasco 1%
- Washington 6%
- Yamhill <1%



# Staff Feedback

*“Hubspot has allowed we me to work smarter, not harder, giving me more time to focus on delivering meaningful impact within our community.”*

*-Admin Coordinator*

*“The CRM has saved me time and improved the functioning of our programs. I estimate at least 5 less hours a week on scheduling and administrative work alone. This doesn’t include the many hours I spent manually aggregating program stats for internal evaluation as well as grant reports, which is now fully automated. I feel more confident that I -and the entire team- have the right, most up-to-date, information on hand whenever we need it.”*

*-Programs Manager*

# *Thank you!*

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**Abby Guyer**

Executive Director  
Xcelerate Women

**Adrienne Chaille**

Economic Development Manager  
Washington County Admin Office