

How Blend brings simplicity and transparency to consumer finance

blend

INDUSTRY

Financial Services

LOCATION

San Francisco, CA

NUMBER OF USERS

350+ employees

PRODUCTS

Confluence Cloud

Jira Software Cloud

Back in 2008, the financial crisis exposed the ever-deepening cracks in our financial systems, one of the most troubling being a lack of transparency.

In the book *Attacks on the Press: Journalism on the World's Front Lines*, President of the Pew Research Center and former Deputy Managing Editor of the Wall Street Journal Alan Murray is quoted as saying, "What you saw in the crisis was... people may have had access to information, but if we can't access it in a way anybody understands then it doesn't make a difference."

The folks at Blend saw an opportunity to make that difference, setting out to build a platform that would bring simplicity and transparency to consumer finance. It was a lofty goal, but the product resonated with lenders or financial institutions looking for a simpler lending system, and the company flourished, tripling their workforce in two years. As it grew, information sharing became a pain point across teams – the sales team wasn't getting marketing assets, product marketers couldn't access the most recent product specs, and there wasn't a central repository for institutional knowledge.

A GROUND-UP SOLUTION FOR SILOED INFORMATION

Terrence Caldwell, a Product Marketing Manager, joined Blend in 2017 and immediately saw the need for a collaboration tool. “We were bringing in a lot of people, and [knowledge transfer] was increasingly getting painful and wasn’t sustainable,” says Terrence, who helped drive internal adoption of Confluence with the help of Ryan Giordano on the People Operations team. Ryan started by creating Confluence spaces for every team, then asked team leads to flesh out the spaces with details. He then conducted trainings to help team members get more comfortable with the tool.

Now, teams at Blend use Confluence for a slew of projects and workstreams. The Marketing and Sales teams use the tool to track deliverables, share assets, and plan events.

“ Confluence became the single-source of truth for client facing teams and helped them deliver on promises to the customer.

TERRENCE CALDWELL
Product Marketing Manager

People Ops and HR use it to organize documents and share policies. The Product Teams use it to document and share specs. The Support Team shares troubleshooting and how-to guides for specific product issues. Blend’s Customer Success Team creates Confluence pages for each customer to track project statuses (usually the implementation of Blend), share meeting notes, and document product feedback.

As a Product Marketing Manager, Terrence works closely with the Sales Team to create assets and marketing materials. He also works with the Product Team to track features and updates that have been committed to clients. All this cross-functional communication was a slog before Confluence. The Sales Team wasn’t getting crucial updates about when assets or features would be available in a timely or accessible way.

“So, we created a central dashboard in Confluence for our product roadmap and what would be released over the next few weeks,” explains Terrence. “It became the single source of truth for client-facing teams and helped them track the things customers expected/looked forward to being released. All the client-facing teams use this dashboard to stay up to date on when things are releasing and also any materials (documentation, marketing collateral, demo videos) created to support the release.”

The Product Team also uses Confluence to keep the entire organization looped in. Every week they share staff-wide status reports on new features, pilot programs, and changes to a major project.

MAKING SPACE TO CULTIVATE TRANSPARENCY

Blend has continued to grow since adopting Confluence, and information now flows freely through Confluence as an information hub.

Teams across the company also have more time to focus on creating the best products and experiences for their customers because emails and meetings have decreased with Confluence..

**“ The Blend mission is to bring
simplicity and transparency in
consumer finance; Confluence brings
simplicity and transparency to work.**

TERRENCE CALDWELL
Product Marketing Manager

“Blend had a very heavy email culture. I used to send really long emails, but now people engage with and read my Confluence pages instead,” says Michelle, a Field Marketing Team member who uses Confluence for event strategy planning, goal-setting, booth and event scheduling, and event pre-planning. Interested parties are getting answers for themselves, and she’s fielding fewer questions.

Terrence points out the ethos behind Confluence specifically aligns with Blend’s mission and the kind of people they want to hire. “The Blend mission is to bring simplicity and transparency in consumer finance; Confluence brings simplicity and transparency to work.”

As the teams at Blend continue to navigate rapid change and growth, Confluence provides a space to share knowledge and collaborate across the entire organization. A culture of transparency takes work, but it can spread naturally with the right tools, people, and processes in place.

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