

Power BI Dashboards: Transforming Pipeline Management and Lender Analytics

Idaho Housing and Finance Association
Management Innovation: Technology

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Entry Title: Power BI Dashboards: Transforming Pipeline Management and Lender Analytics

Category: Management Innovation

Subcategory: Technology

Executive Summary

To proactively manage loan submission inflows and optimize staffing, IHFA implemented Power BI dashboards. These dashboards provide real-time visualization of loan pipelines, enabling predictive analysis for staffing needs and detailed insights into lender performance and loan profiles. This technological advancement ensures efficient resource allocation and strengthens partnerships with lending institutions.

Problem or Challenge

Prior to this initiative, our association faced challenges in anticipating loan submission volumes, leading to reactive staffing adjustments and potential service delays. Additionally, limited visibility into lender-specific performance hindered our ability to provide targeted support and recognize high-performing partners.

Innovation

We developed a suite of Power BI dashboards with the following features:

- **Pipeline Forecasting:** Analyzes historical and current data to predict loan submission trends, allowing for proactive staffing decisions.
- **Reservation Monitoring:** Provides real-time data on loan reservations across all programs.
- **Lender Analytics:** Offers drill-down capabilities to assess the number of loans per lender and detailed loan profiles, including loan types and borrower demographics.

These dashboards are accessible to relevant internal staff, promoting data-driven decision-making.

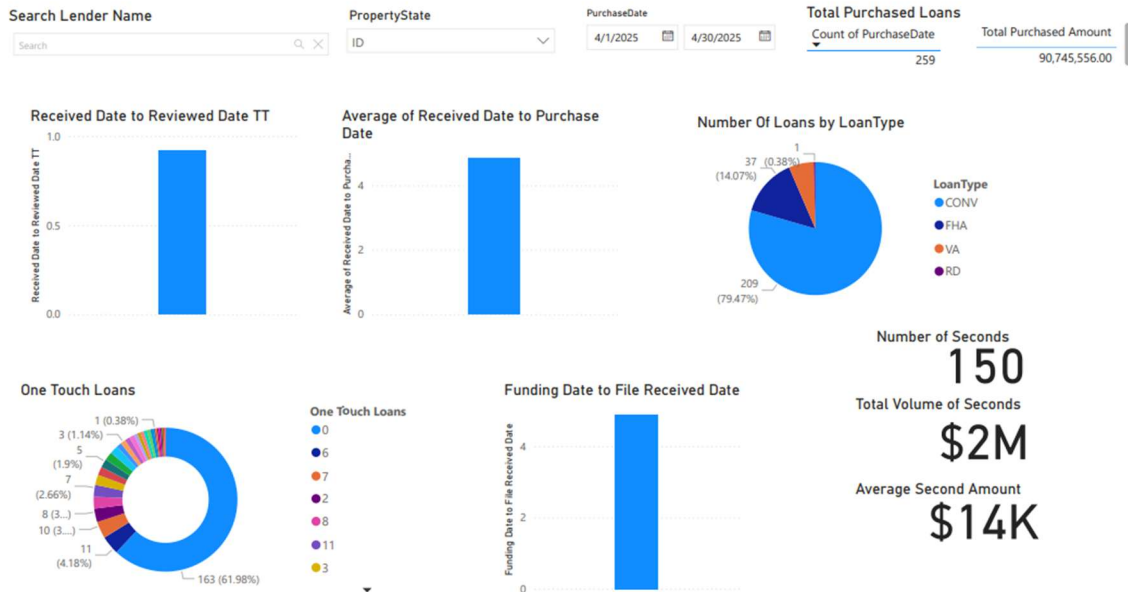
Results and Impact

- **Enhanced Staffing Efficiency:** Predictive insights have reduced staffing shortages during peak periods, improving service delivery.
- **Improved Lender Relations:** Detailed analytics have enabled targeted support for lenders, fostering stronger partnerships.
- **Data-Driven Decisions:** Real-time data access has streamlined internal processes and program management.

Conclusion

The implementation of Power BI dashboards has revolutionized our approach to pipeline management and lender analytics. This technology-driven solution has led to more efficient operations, better resource allocation, and strengthened relationships with our lending partners.

Visual Aids





PurchaseDate
4/1/2025 4/30/2025

PropertyState
ID

Search Lender Name
Search

LoanType
All

377.75K
Average of AppraisalValue

96.29%
Average of LTV

311
Number of First Time Home Buyers

710
Average of BorrowerCreditScore

Loan Attributes

366.61K
Average of SalesPrice

343.24K
Average of OriginalLoanAmount

21.04
Average of PaymentToIncomeRatio

28.55
Average of DebtToIncomeRatio

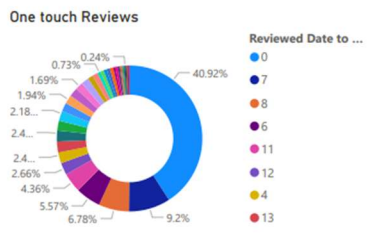
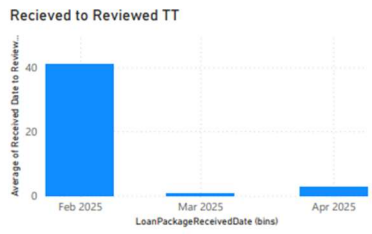
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Search Lender Name:

PropertyState:

PurchaseDate:



Total Purchased Loans

Month	Count
April 2025	413
Total	413

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LoanProduct	Count of LoanNumber
First Loan-Tax Exempt Conv	24
First Loan-Tax Exempt FHA/RD	64
Total	88

PropertyState	Count of LoanNumber
CT	110
IA	102
ID	206
MT	21
NM	112
OR	38
SD	104
TX	2
WA	264
Total	959

30 Day File Recieved Look Back



LoanPackageReceivedDate

4/17/2025 5/1/2025

30 Day Reservation Look Back

