

Implements ZOHO ONE for College Money Matters

Introduction

College Money Matters is a nonprofit organization dedicated to aiding high school students and their families in making informed financial decisions regarding college education. Our core mission revolves around the belief that any student who gains college admission can also learn to navigate student loans wisely. We uphold a commitment to impartiality, avoiding advertising influences, and providing students with the necessary information at their level of understanding. Our platform, comprised of a website and YouTube channel, caters to present-day high school juniors and seniors. College Money Matters stands as a testament to the belief that education is a fundamental right that should be available to all, regardless of economic circumstances.

Background

Founded in 2018 by Nancy Goodman, a former Vice President at Citibank, the organization has set its sights on bridging the gap between academic aspirations and financial realities. With a resolute belief that every student who earns college admission can also navigate student loans wisely, College Money Matters is dedicated to ensuring that economic circumstances do not hinder access to quality education.

Organization

College Moeny Matters

Mission & Vision

Empowering students with financial knowledge for informed college decisions, ensuring equitable access to higher education opportunities.

CASE STUDY

Challenges

Target Audience

One of the significant hurdles we encountered at College Money Matters revolved around effectively managing email communications. Specifically, we grappled with two key aspects:

- The need for timely email reminders for follow-up tasks
- The creation of well-structured email templates, including a welcoming template.

No Centralized Database

Addressing the Need for Potential Donor Information Database. A comprehensive database to efficiently store and manage potential donor information. As well as Donor information.

Track and manage expenses

No System to track and manage organization expenses as they save their information in unstructured way.

No Reminders setup

Organization identified the necessity for a system that enabled to schedule future call reminders for effective engagement with valued donors, dedicated vendors, and enthusiastic students.

Centralized Contact List Management

Need of Centralized database that stored contact lists categorized according to specific criteria. That ensured contact information was easily accessible and well-organized.

Applicant Module and Enhanced Processes

College Money Matters identified a gap inability to enhance the experience of applicant students and provide a comprehensive platform for their journey.



CASE STUDY

Solution

Efficient Email Campaigns: Connecting with Donors in Bulk

At College Money Matters, we recognize the significance of reaching out to our valued donors effectively. To ensure streamlined communication and engagement, we have implemented **Zoho Campaign** for orchestrating email campaigns in bulk. This approach empowers us to connect with our donors collectively while maintaining a personalized touch in our interactions

Automated Email Reminders: Enhancing Follow-Up Practices One of the pivotal benefits of our **Zoho Mail** integration is the ability to automate email reminders. This ensures that follow-up tasks are executed promptly and consistently.

Transparent Donation Utilization Updates: Demonstrating Impact With the aid of Zoho Mail, we can send out emails to inform our donors about how their generous contributions are utilized by the organization.

Strategically Scheduled Meeting Reminders: Nurturing Relationships Scheduled email reminders play a pivotal role in nurturing our relationships with potential donors and vendors.



Potential Donor Information Database

Categorized potential donors by engagement and interests to pinpoint promising candidates.

Delivered personalized communications that expressed gratitude and underscored their pivotal role in our initiatives. Crafted tailored **engagement plans** using **Zoho Forms** including event invitations, pertinent success stories, and transparent explanations of potential donation outcomes. Facilitated seamless transitions with straightforward **calls to action**, such as dedicated links and direct contact information.

Ensured timely follow-up and conversion through personalized communications and efficient CRM tracking, while also offering new clients a warm onboarding experience to cultivate a deeper understanding of their positive impact and ongoing engagement possibilities.

Automated Reminder Setup

Within **Zoho CRM**, we integrated an automated reminder system. This feature enabled to schedule future call reminders with precision.

Customizable Alerts: Zoho CRM's flexible options allowed to customize reminder alerts according to the specific needs of each collaboration. This ensured that relevant team members received timely notifications about scheduled calls.

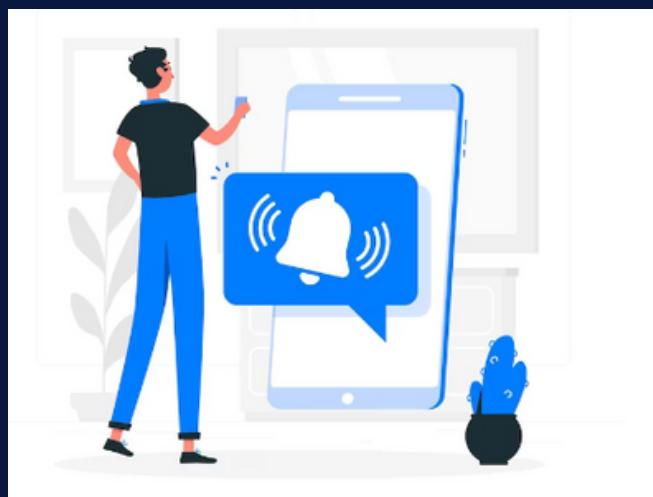


Vendor Module and Payment System

Vendor Module: We developed a dedicated vendor module to capture essential vendor details. This module centralizes vendor information, including contact details, services provided, and terms of engagement.

Invoices and Payment Module: Within this system, we introduced a robust module for invoices and payments. This module enabled to track and manage vendor invoices, payment due dates, and transaction history efficiently.

Expense Analysis: The solution extends beyond invoice tracking. We implemented **Zoho Expense** for expense analysis, enabling us to evaluate expenditure patterns, identify cost-saving opportunities, and make informed financial decisions.



CASE STUDY

How the System Helped

The CRM system played a pivotal role in College Money Matters operations by centralizing data and streamlining back-office functions. It facilitated the centralization of donor, vendor, and student databases, ensuring the stability of their business operations. Through marketing efforts, including **Marketing Automation, Zoho Campaigns, and Forms**, all leads were generated and seamlessly captured directly into the CRM. This integration improved the efficiency of the follow-up process, enhancing overall operational effectiveness.

Applications Implemented

- Marketing Automation
- Zoho Analytics
- Zoho CRM
- Zoho Campaigns
- Zoho Forms
- Zoho Expenses

Future Plan

Since the initiation of **College Money Matters** first project in collaboration with FAIRCHANCE FOR CRM, the partnership has flourished with a series of successful ventures. The two entities maintain an ongoing retainer for future collaborative opportunities, showcasing their commitment to continued mutual success.



CLIENT FEEDBACK



Nancy Goodman

Founder Of College Money Matters

Thanks for your work. I have a lot to do to learn the system, but it looks good to me. FAIRCHANCE FOR CRM has high rating.



CASE STUDY

About FAIRCHANCE FOR CRM

FAIRCHANCE FOR CRM provides round-the-clock services and maintenance to keep your business on the growing and developing track to generate the revenue within the budget. We have expert team to work on the Zoho CRM platform thoroughly with all of automation and innovation. In addition to this, we are able to provide individualized solutions that are adapted to match the particular requirements of each customer, so ensuring the highest possible levels of efficiency and production.

With 700+ customers in 70+ countries, today we are all set to become a trusted growth partner to your business!

For the purpose of assisting businesses in improving their customer relationship management, the FAIRCHANCE FOR CRM platform offered solutions that were both individualized and efficient in terms of cost. enterprises are able to obtain significant insights into the behavior and preferences of their customers using the platform's powerful analytics capabilities, which in turn enables the enterprises to modify their marketing tactics in accordance with those preferences. Businesses have the ability to improve customer happiness and loyalty while simultaneously optimizing their use of resources to achieve optimum efficiency when they implement FAIRCHANCE FOR CRM.

Contact Us

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