

**ORGANIZATION OPERATING IN THE NOT FOR PROFIT DOMAIN RAISING FUNDS FOR SCHOOLS, CHILDCARE CENTERS AND CLUBS ACROSS AUSTRALIA THROUGH THE SALE OF HOME ESSENTIAL PRODUCTS****KEY HIGHLIGHTS**

Industry - Non-Profit

Project Duration -  
Two Months**SCOPE OF WORK**

- CRM
- Campaigns

**SERVICE OFFERING**Digital Transformation -  
Optimization of the Zoho  
One Suite (CRM and  
Campaigns)**CHALLENGES / REQUIREMENT**

- Need to maximise the use of Zoho CRM
- Resolve issues pertaining to Zoho Campaigns to ensure effective Campaign rollout
- Ensure adequate flow of customer information from CRM to campaigns
- Resolve issues pertaining to lead transfer from Facebook portal to CRM

**OUR SOLUTION OFFERING**

- Conducted a training to showcase the ways in the CRM module can be effectively utilized to meet business requirements
- Developed automations and enhancements in the CRM module to increase operating effectiveness
- Effectively integrated Facebook leads with the CRM
- Refined Zoho Campaigns to ensure effective campaign rollout and tracking of campaign responses
- Ensured smooth flow of information between CRM and Campaigns

**IMPACT**

- Maximized the use of the Zoho One suite through the effective integration of CRM & Campaigns
- Oriented the workforce to the various features of the Zoho CRM module applicable to the business for increasing efficiency in operations
- Ensure effective integration between social media platforms and CRM
- Increased campaign effectiveness and enabled periodic monitoring of campaigns