

NON FOR PROFIT

Premium Onboarding Package



Monthly Reports
and Analytics



Constituent
Management



Membership
Management

NFP CRM



Sponsor
Management



Event
Planning



Donation
Management



Volunteer
Management



Agenda

- ❑ Account & Technical Setup
- ❑ Business Analysis for NFP
- ❑ Data Migration &
Web Forms
- ❑ Subscriptions Management
- ❑ Mail Merge Documents & Contract
Sign and Survey Management
- ❑ Events Management
- ❑ Email Marketing and Social Media
Management &
Training & Handover
- ❑ Custom Support Plans

* NFP Custom App powered by Zoho Apps

Prior to Kick off

Account & Technical Setup

- Invite your teams
- Applications overview of your package
- Manage User Licences
- Set up your domain
- Identify Champion users of your team
- Project Onboarding in Projects
- Initiate online meetings periodically

WEEK

1

Business Analysis for NFP CRM

- Configure Constituent Management tool modules
- Set up IMAP for your emails
- Connect your Web to Lead form
- Configure Security roles and profiles
- Choose Dashboard & Reports templates
- Choose Email Templates
- Set up workflows and assignment rules
- Set up Views and Filters

WEEK 2

Data Migration

- Standard data migration (a CSV file format) from the current system into the CRM

WEEK 2

Web Forms

- Build your own Forms
- Choose templates and design forms
- Integrate your Form into the CRM
- Share the form to collect leads
- Set notifications internally
- Set up the view to analyse reports
- Import your Volunteers, Contacts, Donors, Members and Sponsors into CRM

WEEK

3

Subscriptions Management

- Configure automatic invoices and recurring payments
- Set up payment options using PayPal, stripe, DD
- Configure the analyze and visualize real time reports on subscriptions
- Integrate Subscriptions Management into CRM
- Invoice Managements for Donors, Sponsors and Memberships

WEEK

4

Mail Merge Documents and Contract Sign

- Train to work with tool to mail merge documents templates
- Integrate your mail merge document tool into CRM
- Share the form and collect leads
- Set notifications internally
- Integrate your Contract Sign into CRM and Mail Merge tool

Survey Management

- Choose surveys templates with different question types and skip logic
- Integrate your survey responses with CRM data to find out what makes your customers happiest
- Set up analyze and visualize real time reports on survey responses

WEEK 5

Events Management

- Design the event website for your events
- Configure event tickets
- Schedule the email communication
- Enable track Sponsorships for Events
- Integrate Events Management with CRM
- Analyze and visualize analytics of your events

WEEK 6

Email Marketing

- Configure lists to segment your leads
- Integrate your CRM and Email Marketing tool to view responses and member status
- Train on Newsletter templates that match your style
- Train on Email Marketing tool

Social Media Management

- Connect your social accounts
- Configure social monitoring streams
- Train on Scheduling social posts
- Integrate Social Media Management tool with CRM to generate leads
- Configure the track to engage visitors
- Establish connection between social media management and CRM

WEEK 6

Training & Handover

- Up to 3 hours Standard training for Champion users

Oscillosoft Support Plans

- 5-10 users will get 1 HOUR FREE support per month via ticket
- 11-39 users will get 2 HOURS FREE support per month via ticket
- Over 40 users will get 3 HOURS FREE support per month via ticket

* There will be an excess rate if it is more than 1 hour as we will bill at the standard rate (with 20% discount i.e \$120 per/hour, minimum 1 hour)