

Initiative Tracking Dashboard Case Study



The Customer

Kramden Institute, a Durham-based non-profit organization, has been working since 2003 to bridge the digital divide by providing technology tools and training. As a computer refurbisher, the organization collects thousands of devices yearly, restores them, and distributes them back into the community. Kramden has distributed more than 50,000 computers to students and adults across North Carolina and beyond. More than 9,000 adults and students have participated in their education and training programs since 2014, including computer classes for adults and STEAM afterschool programs and summer camps.

After migrating from Salesforce to Zoho One in January 2021, Kramden's engagement in the Zoho platform has exploded. Staff enjoyed the efficiency and effectiveness of Zoho CRM and Zoho Creator to manage their Donations, Volunteering, and Equipment Award programs. They have since expanded to leveraging seven more applications, including Books, Campaigns, and Desk making Zoho a core part of the organization's operations.

The Challenge

As part of Kramden's mission to "bridge the digital divide", they have become nationally recognized industry leaders in technical education for people of all ages. In addition to hosting their own technical education classes, Kramden also trains other organizations on how to run successful classes in their communities. As part of these education programs, surveys are taken before and after each of the classes to measure the effectiveness and impact on each of the students.

Initiative Tracking Dashboard Case Study



They needed a way to define and track the class impact survey data with respect to a complex configuration of partnerships and engagements, known as "Initiatives". Every class session conducted needed to be recorded in the system along with each participant's details and the results of their pre and post surveys and related to specific Initiatives. The team needed to be able to pull the impact metrics by several different segments, including by class, initiative, instructor, and participant demographics (age, race, ethnicity, etc). One of the programs also required the tracking of eligibility based on the geographic location of the class or the home address of the participant.

In addition to defining a flexible tracking structure that could scale with the organization, Kramden needed a way to monitor the performance of each initiative and share data with specific initiative partners. A "one-stop-shop" dashboard was requested to make analysis of the data quick and effective.

The Solution

This solution leaned on several applications within the Zoho One suite and built off the solid foundation of tracking class registration and attendance in Zoho CRM.

Registration

- ▶ Class registration and participation was tracked via Campaigns in Zoho CRM and attendance was recorded against each Campaign Member.

Configuration

- ▶ A custom module in CRM named "Survey Pairs" defined the pre and post class surveys ids that need to be associated within the reports.
- ▶ Campaigns can be related to many different Initiatives, each with their own distinct configuration that dictates different parameters and automation.
- ▶ Specific options per Initiative included:
 - ◇ The "Eligibility Type" dictated if class participants should be considered "eligible" for reporting based on geography or if all participants were eligible.
 - ◇ The class address to determine geographic eligibility for certain programs. This

Initiative Tracking Dashboard Case Study



- was used when the class participants were considered eligible if the location of the class was in a certain geographic area.
- ◇ What Survey Pair should be used to collect data against the Initiative.

Recording Results

- Each person that attended the class had a "Participant" record generated that would be used to lock the demographics.
 - ◇ After generation, the address of the Participant is evaluated against the census.gov API to verify if it falls within the defined eligibility area. If the address is within the defined eligibility area, based on census tract, then it is automatically marked as eligible.
- Given most participants enrolled in class to improve technical literacy, survey data was collected using paper surveys and volunteers recorded the responses using Zoho Survey.
- Each recorded survey was tagged with a unique participant id to help tie together the data from the CRM to the Survey response data.

Reporting

- An extensive dashboard was built in Zoho Analytics unifying the data from CRM and Zoho Survey.
 - ◇ Statistics on the demographics of class participants (age, race, ethnicity, gender, etc) and access to technology ("Do you have access to a computer")
 - ◇ Survey Question level improvement statistics (ie "I feel confident using a computer" went from a 2.3 before the class to a 4.8 after).
 - ◇ Instructor level performance metrics.
- Reference tables were built that allowed the team to map specific questions to categories for roll-up grouping and reporting without input from developers or consultants.
- All metrics could be easily filtered by the name of the Initiative, the name of the class session (Campaign), or the Survey Pair that was used to capture the survey results, giving the team the ultimate flexibility to analyze and report on specific segments.
- To provide information to their partners, they created separate instances of their

Initiative Tracking Dashboard Case Study



dashboard with a global filter on just the information required for their partner's program/initiative. They used several different methods to share these additional dashboards securely.

The Kramden Institute has implemented a flexible and scalable solution that will provide them the structure to track their class and program performance against a dynamic set of criteria and requirements that they can control. This investment helps them demonstrate their ability to help *Bridge the Digital Divide*, but also allows them to help other organizations do the same.

"The Zoho One suite has been instrumental in improving Kramden's operational efficiency.

- Cyndy Yu-Robinson,
Executive Director Kramden Institute