Apprisen: Building Financial Health

* Mission: empowering people to improve their financial well-being through counseling/coaching community outreach & financial education
  + Helps them work with creditors to lower interest rates and build program that would be helpful to pay off their debt
  + Work with people long term – financial goals over a few years (1+)
    - One on one
  + Certified housing counselors
  + Big emphasis on other community outreach programs – general personal finance
* Problem:
  + Americans are very low ranking on their saving rate
    - Owe a record $1.04 trillion in credit card debt
    - Only 40% have and maintain a budget
  + Financial health is a foundation
* Actions already taken
  + Debt management program
  + Growing into digital content
  + On-going support from client success team
  + Receive access to free financial tools via website, social media and money minute blog articles
* Challenge
  + Help people engage with their finances
  + Support and encourage our clients
  + Help clients successfully complete the debt management plan
  + Want to be able to connect with all of their clients everyday
  + Want an app
    - Allows clients to find information about their program
    - Find their progress – visual representation
      * Motivational visual that helps them stay motivated
    - Access tools and resources depending on where they are in their journey
    - Be able to communicate with them through their solution
      * Ex) if they miss their payment – ask why it was missed and how they could help
    - Notifications about their progress

Inroads

* Frank C Carr wanted to create an equal playing field – wanted more diversity within corporations – didn’t want people to all sound the same and look the same
* Why
  + Students
    - They have access and partnerships to big companies
  + Clients
    - Diverse range of talent
* Current state
  + Main ways of communication: emails, phone calls, texts – demographics are nto responding – want an app
  + Different programs
    - Student summer paid internships
    - Full-time career opportunities
    - Fundraising/sponsorship opportunities
    - High school pre-college program
    - Alumni engagement
* Future state
  + Wants an app
  + Gives access to programs/services that enhance
    - Talent recruitment for both internships and experienced hiring programs
    - Provides a streamlined process of giving/fundraising
    - Creates an accessible training/education platform readily accessible to the demographics we service (candidates, interns, staff and employer partners)
* Q/A
  + Sections they want
    - **College**
    - Sponsorship and giving
    - Pre-college
    - **Alumni**
  + Wouldn’t want a mentorship program – looking to scale
  + Visually picturing a drop down selection
  + Concerns
    - Limited resources but have good outside sources for going forward
  + Have a website students can pull up – would prefer an app
    - Web application isn’t bad but first preference is a mobile app
  + Features that are on the website that would be important for a mobile app
    - Apply if student
      * More self driven – can get all the way through getting ready to be sent to a client without having to talk to someone
    - Company – can go on and see what they offer
      * Limited – just text – want to be able to actually do something
      * Thinking – partner inquiry – can set up date and time for a meeting and the employees can confirm / deny the time
  + How often do you expect the contents of app to change
    - Would want it to be slightly easier to change the details
  + Steps for students
    - Application
    - Training session – 2 hours – candidate prep session
    - Interview
    - Updated resume in their approved format
  + Volume of users – 10-12k applicants throughout the year
    - Not all fit criteria / make it through the process
  + Qualifications on website
  + Not guaranteed an internship – guaranteed an opportunity to be matched up with one
    - “match eligible stage”
* Alumni
  + Volunteer to do mock interviews
  + Summer training series
  + Sit on boards / want to get involved and be in leadership positions
  + Ways to get involved
    - Volunteering
    - Giving
    - Starting up local alumni chapter
  + Benefit: lifetime opportunity for more jobs
* Need to connect to internet to connect to resources / data
* Applications are stored in database – Sugar crm
  + All of the data is stored in the database
* Corporate company
  + Go onto site
  + Send email to sales department and then gets assigned to a director
  + Director will outreach and connect with the company and go through the conversation with them
* Problems they want to address
  + Move students through the process a lot easier – be able to send an alert to tell them they need to acknowledge the process
* What would you want for existing corporate clients
  + Be able to review the resumes themselves instead of having the employees send them to them
  + Would be able to see candidates that match requirements – kind of like a filter for a list
  + Would want to digitize
    - Intern reviews
    - Who are they returning back (return offers / full time offers)
    - How many intern positions they want for the next year
  + Normally one main point of contact with the corporate company
  + Filters
    - Major
    - Gpa
    - Location
    - Class rank (freshman, soph, junior..)
* Company colors – blue
* Students have to skype their mentor whenever they have to
  + Manager can send or request a meeting for them – to remind the that it is time to schedule a meeting (monthly/quarterly)
* Need to have both android and iphone
* Legal
  + Don’t collect social security
  + Collects work authorization but not released to companies – just for them to know
* Data requirements
  + Archive data every year
  + Go through recertification process at the end of the summer – seeing if they are still interested in inroads and make sure that they want to come back for the next year
  + Information is either active or inactive
  + Delete or merge same accounts
    - Logical key on database – user name and password
* Want administrative profile – so they can activate and deactivate accounts
* Priority: Leadership Development Academy
  + Download app
  + See student recruitment with leadership development academy
    - Applying and status and track through the process