

Resources

CEE

Challenge 1: Create a solution that enables CEE staff to track the lifecycle of clients.

Clients are individuals who seek CEE's services in any capacity, whether through their programs, services or support. Tracking the lifecycle of clients is important for 2 reasons:

- 1) To improve the ability of staff to access client information as the client utilizes different services.
- 2) To collect information that can contribute to data-driven solutions about their client retention.

It can be challenging for staff who have not been working with a client to start working with them because there is very little information tracked of how they have been involved with CEE – much of this information is kept as head knowledge between various staff members. It's important to be able to understand typical client journeys in order to make data-informed decisions for funding, reporting and program improvements. Tracking the client journey will help staff better understand the strengths and areas of opportunity within CEE.

Ideal Features:

- Track client journey from first point of contact with CEE (referral or outreach) through program participation and then to alumni services
- Identify stage of client (current program recipient, alumni year 1, alumni year 2, in contact, unresponsive to staff, etc.)
- Searchable/Tagable
- Encourages engagement with clients to decrease dropout rates
- Support for importing data from the system that CEE currently uses – Kobo Toolbox, which has an [API](#) *
- Secure access from personal devices

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What is Kobo Toolbox?

"Kobo Toolbox is a free open-source tool for mobile data collection, available to all. It allows you to collect data in the field using mobile devices such as mobile phones or tablets, as well as with paper or computers." –[Source](#)

CEE uses the Kobo Toolbox to:

- Facilitate online application for all program cohorts
- Collect baseline data on program participants
- Share data with board members, program partners and funders. (Graphs are preferred for quick reference)
- Capture case notes

[CEE Program Life Cycle Excel Sheet](#)