



Funds For Good

How to combine the passion for finance and human values to create a fairer world?

Here is the bet taken by the 3 partners of Funds for Good which distributes 50% of their profit for social projects. The social project consists in reducing inequalities and precariousness by helping unemployed people to integrate in a sustainable way through entrepreneurship.

Business Solution
Service Companies

Sector
Finance/Insurance

Collaborators
0 - 9

Website
www.fundsforgood.eu

CHALLENGE

Like any start-up, the company faces challenges of growth. The company is looking for a CRM which can manage the interactions both with the customers and prospects as with the entrepreneurs. The system must be able to follow the commercial pipe which is valued on the basis of the amount of funds invested, monitor support for social projects and allow targeted communication according to different profiles. CRM must be an intuitive tool to allow the team to be autonomous in managing their communication.

SOLUTION

The company has chosen Odoo and Eezee to meet these challenges and support the growth of the company. The CRM, Sales, invoicing, E-mailing and Event modules were chosen for their ease of use and integration. Thanks to Odoo studio, a few adaptations have made it possible to provide a personalized solution for Funds for Good.

RESULTS

After 3 months of implementation, training and data migration, Funds for Good manages its commercial activities with more accuracy and has a commercial pipe based on investment values. Funds for Good better supports the entrepreneurs thanks to the entrepreneurs portal. Today, the teams are autonomous in carrying out marketing campaigns.

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Modules

Accounting

CRM

Email Marketing

Events

Sales

Studio

Website