

Help NM

<https://helpnm.com/>

HELPM is a non-profit organization that assists low income and indigent populations in the state of New Mexico, providing programs, assistance, direction, and education to help them overcome joblessness, homelessness, and other factors that prevent them from being self-sufficient.

HELPM offers a variety of programs, some government-funded, some fueled by donations, etc that help the local population with the following obstacles:

- Childcare and expenses
- Utilities, housing, a place to sleep
- Feeding their families
- Education for preschool through GED
- Finding a job - they interact with both potential employees for placement and companies that are looking for employees
- Covid Relief Programs

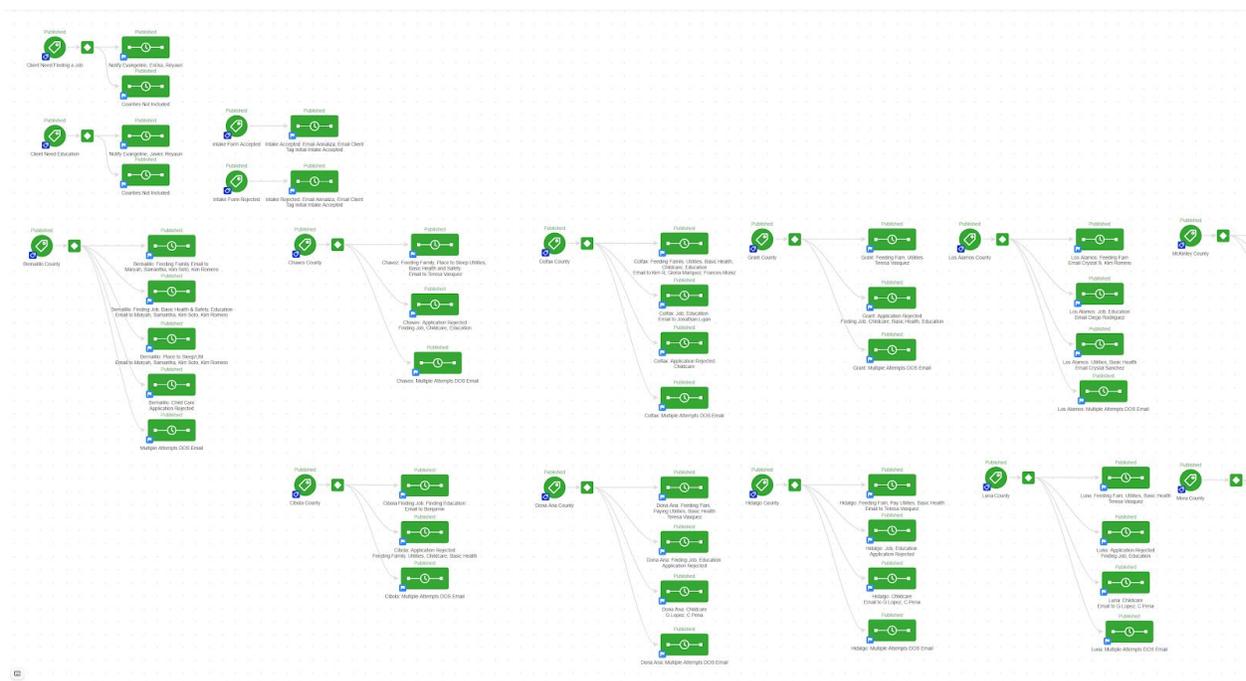
I have created numerous campaigns for them.

- 1) Routing Incoming Relief Requests - this intake routing system I have created for them starts with them filling out a form on the website that was built through formidable. They are then routed through the backend, with various sequences that separate them out and to specific caseworkers based on several factors.
 - a) Type of help they need
 - b) County
 - c) Crisis Status (In crisis, vulnerable, safe)
 - d) Age/Status as immigrant farm workers, youth, and families
- 2) They currently have 22 campaigns running that were created and installed by me personally.

HelpNM Intake Routing

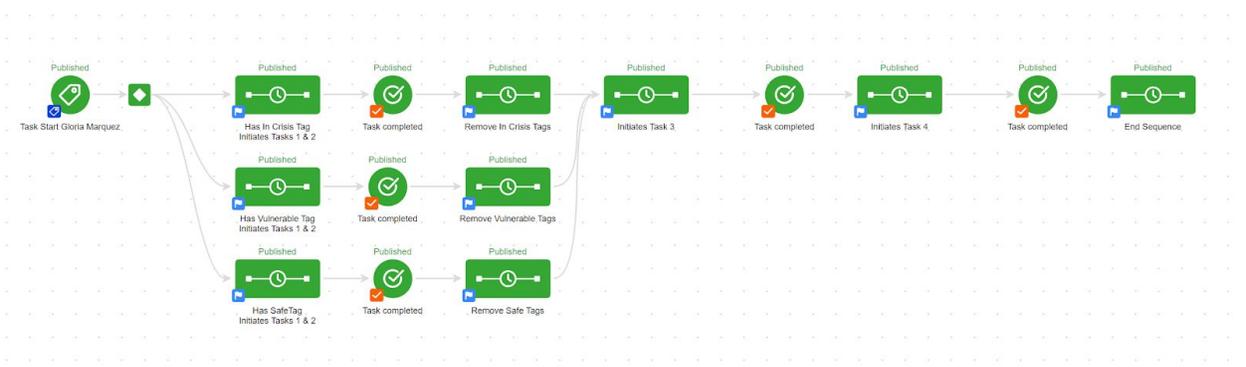
This is an example of intake routing - where applicants information is being used to route them to specific caseworkers for specific locations, needs and crisis status evaluation.

This campaign spans I believe 30ish different counties in New Mexico (it's much longer than the screenshot)



When potential clients fill out the form, it's being routed through Zapier to Infusionsoft, then the caseworkers receive the client info and are assigned cases depending on where the client is located (county) and their need - for instance, Jonathan gets only job seeker requests from a few specific counties. If the crisis status is SAFE - they can take up to several weeks to finish the case. If the client is VULNERABLE (determined by answers on the webforms) they have 72 hours. If they are in crisis, the tasks must be performed within 24 hours.

This is an example of a “task campaign” for one of the caseworkers:



This is an example of a campaign I have for them called Industry tagging, which takes answers from a form that employers fill out about the kind of work they do:



This is a campaign (HELPM Employment Form & Job Seeker Routing) that routes both job seeker requests and employer requests for job postings to the correct people, along with scheduling for their initial meetings, and recording of the outcome of those meetings:



My work with them is largely about getting their applicants in front of the right people so that they can get the assistance they need. Part of it is also taking ALL the information and moving it to “Record” tags, so that if Sally Sunshine applies for assistance with Childcare in 2019, she can do so again in 2020 because all the tags and items that trigger the sequences are removed and stored as record tags. This is something critical in many campaigns - and its a point of failure because most people don’t think about the needs to also REMOVE tags that are triggers after they have triggered what they need to.

I have also created training documentation for them, I have flown to their offices and trained their staff in person. I disseminate training material via Youtube, PowerPoints, Videos, and campaign documentation. They have been a client of mine since early 2019.

Housing Solutions of Northern Arizona (HNAZ)

<https://applications.housingnaz.org/>

NAZ Housing Solutions is a nonprofit, subsidized housing organization that helps to connect low-income populations with HUD Loans, Credit and Housing Counseling, Debt Education and Counseling and Down Payment Assistance programs.

Their application process is extremely detailed, being a 7+ page series of webforms that ask for information regarding income, debts, monthly budget expenditures, credit report authorization, dependents, employment info and so on. The forms were built on Formidable by a colleague, then I take all the information and route it for them.

They also use a plugin called ApproveMe, which is similar in function to DocuSign, to send applications for digital signatures and authorizations.

My task was to create intake routing for them, similar to HELPNM, routing the appropriate forms to the appropriate people depending on their program needs.

They also needed several internal forms that allow them to send specific documentation to specific clients (For instance, someone in the Down Payment Assistance program might get a document on repayment terms, while someone there for credit counseling will get documentation on that.)

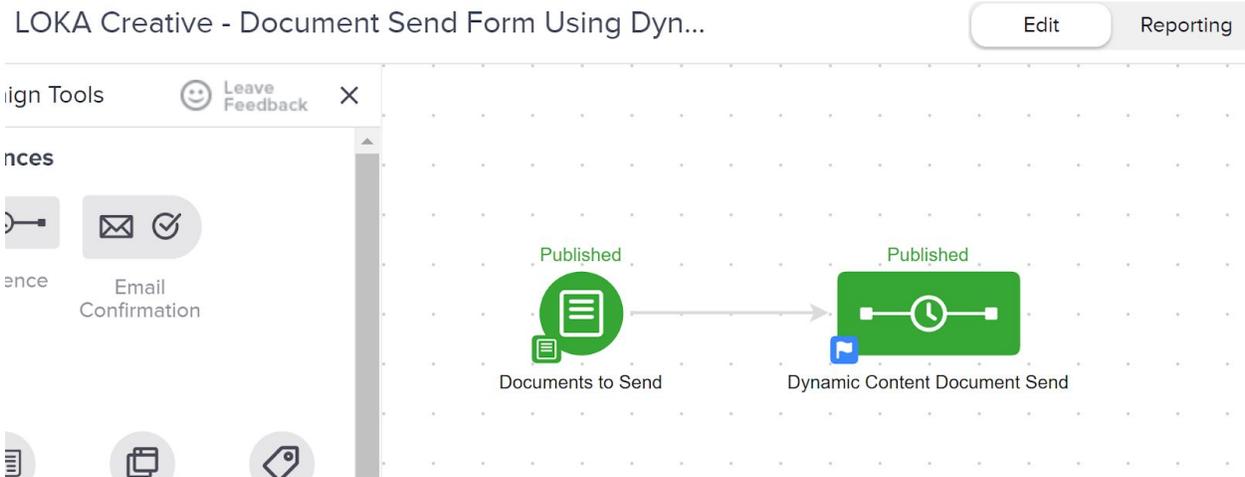
Currently, I am also building a rental application sequence to manage their rentals, renters, renewals, move-out inspections, and the waitlist.

(You'll see Loka Creative on here - this is an agency I am partnered with out of New Mexico/ Dallas Texas - I contract with them for all their Infusionsoft/Keap builds and I use a different Partner Login to manage their work.)

This is their intake routing campaign, not quite as complex as HELPNM, but they have a multitude of forms and appointments to take care of.



This is a very simple campaign I made them that uses Infusionsoft's new feature called Dynamic content - which means you can set up one email with a variety of logic statements, so depending on the criteria you add, will show different content in the email.



Hello ~Contact.FirstName~,

Thank you for requesting the following information:

[% if contact.tags.uids contains "432" %] [City EAH Info Sheet](#) [% elsif contact.tags.uids contains "434" %] [Fair Housing Info](#) [% elsif contact.tags.uids contains "436" %] [Client Documentation List](#) [% elsif contact.tags.uids contains "438" %] [Client Code of Conduct](#) [% elsif contact.tags.uids contains "440" %] [Credit Authorization Form](#) [% elsif contact.tags.uids contains "442" %] [City Land Trust Info Sheet](#) [% elsif contact.tags.uids contains "444" %] [CHAP Info Sheet](#) [% elsif contact.tags.uids contains "446" %] [Home Inspection Document](#) [% elsif contact.tags.uids contains "448" %] [Individual Client File Checklist](#) [% elsif contact.tags.uids contains "450" %] [Idea Wish Fee Disclosure](#) [% elsif contact.tags.uids contains "452" %] [Lender List](#) [% elsif contact.tags.uids contains "454" %] [WISH Info Sheet](#) [% elsif contact.tags.uids contains "460" %] [Basic Radon Facts](#) [% elsif contact.tags.uids contains "456" %] [Lead Based Paint](#) [% endif %]

Please right click on the download link, and "save-as" to a location on your device where you will be able to access it in the future.

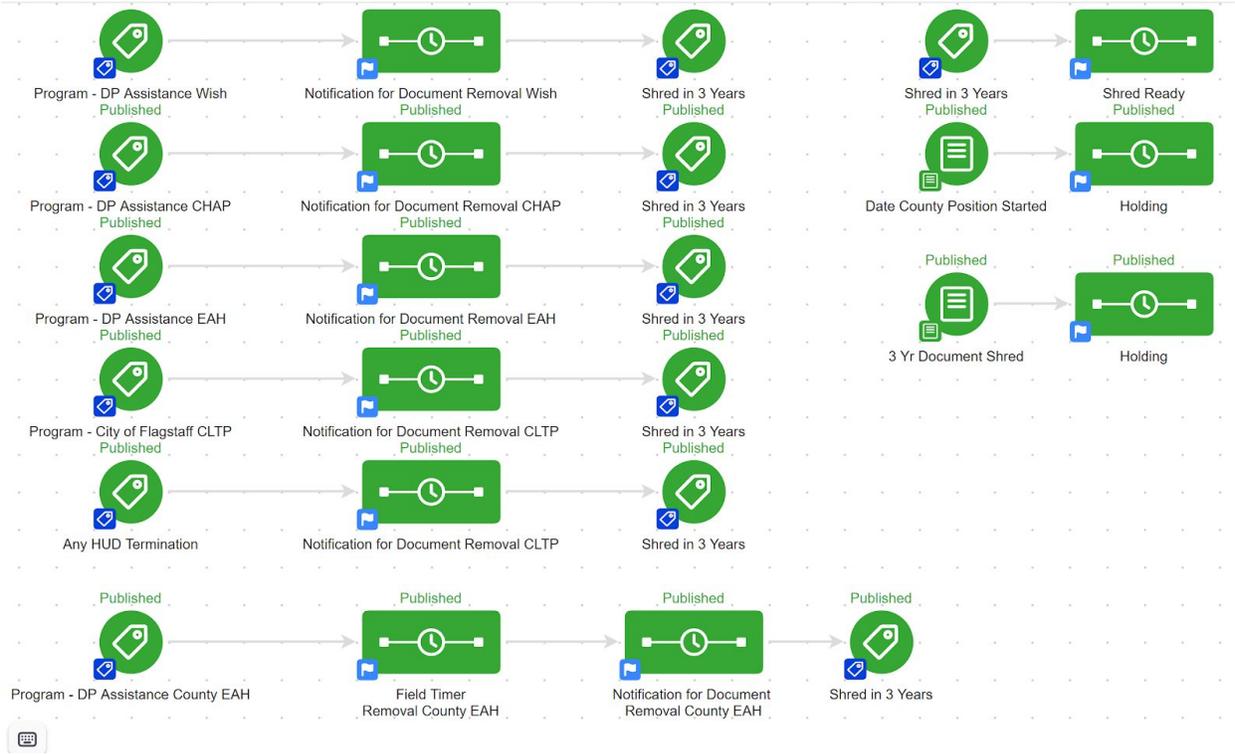
Regards,



Housing Programs Manager
Housing Solutions of Northern Arizona



This is a sequence (Loka Creative - HNAZ Housing Processes (Timers for File Destruction)) I built for them to remind them to destroy documentation for specific kinds of applications in the variety of time frames designated by each program.



Current Lease Customers campaign:

