



AI-Ready Nonprofit CRM Blueprint

**Cut admin • Prove impact faster • Scale without hiring
With AI-powered Zoho CRM + agents.**

The 50/50 Advantage

- NZ\$8,000 wallet credit after verification.
- 50/50 split on every invoice up to NZ\$8k.
- Apply → Credits → 50/50

Eligibility & Application

- ✓ **Who:** Registered NFPs / Charities / Donee orgs.
- ✓ **How:** Sign in → Submit proof → Approval.
- ✓ **Need:** NZBN number, Based in NZ or Aus

90-Day CRM / AI Rollout Plan

0–30 days

Data governance, unified model, AI agent #1
KPI: Response time ↓ 30–50%

31–60 days

Member / client / grants pipeline, journeys & automations, AI agent #2,
KPI: Admin hours ↓ 20–30%

61–90 days

Analytics, Reports & Dashboards, re-engagement, AI agent #3,
KPI: Report cycle ↓ 50–75%

Your Zoho Stack (Sample)

CRM • Forms • Marketing Automation • Campaigns • Books • WorkDrive • Analytics + AI agents (for follow-ups, routing & reminders, intake triage, deadline nudges)

55+ integrated apps, Zoho gives us a single view of supporters and activity — without 100's of spreadsheets

✓ **Automate.CX match Zoho's 50% wallet credit with 50% off consulting and implementation**

Get Started in 3 steps.

1



Create a Zoho One [NFP Trial](#)
(55+ apps 30 days)

2



Apply for 50% [Wallet Credits](#)
Ensure you use the same email

3



Book a 20-Min [NFP Strategy Call](#)
(Free)