

This process flowchart will help you see how easily CFS' college-planning software, services, marketing material, add-ons, etc. fit into a coordinated and comprehensive approach to college planning. This will help you fit your college-planning services into your existing processes and business model.

Current Prospect Pools

Clients
Associates
Friends
Family
Referrals

New Prospect Pools

Direct Mail - [CFS Postcard as part of Premium License](#)
Organizational + Professional Relationships - [CPA, CFP, etc.](#)
Seminars - [CFS PPT add on](#)
Internet Marketing - [CFS Premium License](#)
Advertising + Cold Contacts - [I help families save ON...](#)
Schools - [public, private, home schools](#)

Prospects: Parents of college bound children

Marketing Materials for College Planning services:

Good News Letters - [free download in admin](#)
Hope for Parents Slick - [free download in admin](#)
PPT Presentations + College Ed Express Newsletter - [add on](#)
Branded or Premium Website - [licence option](#)

Marketing Materials for Client Care Center Services:

PPT Presentation - [add on](#)
Brochure - [free download in admin](#)
Prospect Website - <http://ccc.collegiatefundingsolutions.com>
College Ed Express Newsletter - [add on](#)

1. Prospect Becomes Client

Data collection for college planning via CFS college-planning software

Birth

High School Jr/Sr Graduation

Data Collection Methods - [Ages 0-High School SR](#)

- By the advisor during client meeting
- By client - send [completed PDF](#) dataform to advisor or submitted through the advisor's branded site

Administer and score college questionnaire for CCC solutions. [High School Jr/Sr](#)

- [Download questionnaire](#)
- [Download advisor scoring key](#)

2. Generate College Planning Reports via CFS College Planning Software

[Download instructions for generating college planning report](#)

3. Develop action plan and recommendations

Based on college questionnaire score, action plan recommends Client Care Center (CCC) services
Contact CFS at **919.469.1996** for help as needed

4. Client meeting. Begin implementation. Schedule interview with director of CCC: 814.528.5243

Interview successful. Register client for service through admin site