

## HLP.Guru Project Planner

Understanding your needs is critical to building the right solution. Please complete this form to help us define your requirements and plan for a successful implementation of HLP systems.

**Organization Name:**

**Project Contact**

**Target Implementation Date:**

Component	Option Selected	Included? Yes/No	Number
<b>Target Customers</b>			
Participating Areas / Departments	<input type="checkbox"/> Credit Counseling <input type="checkbox"/> Housing Counseling <input type="checkbox"/> Debt Management <input type="checkbox"/> Financial Coaching <input type="checkbox"/> Other _____		
Reason for Referrals	<input type="checkbox"/> Credit Score <input type="checkbox"/> Debt-to-Income Ratio <input type="checkbox"/> Cash for Down Payment / Closing <input type="checkbox"/> Other _____		
Milestones to Reach	<input type="checkbox"/> Credit Score _____ <input type="checkbox"/> DTI _____ % <input type="checkbox"/> Cash for Closing \$ _____ <input type="checkbox"/> Other _____		
Offer to Customer	<input type="checkbox"/> Subsidy for Enrollment: \$ _____ <input type="checkbox"/> Time in Program: _____ months <input type="checkbox"/> Closing Credit \$ _____		
<b>Marketing &amp; Outreach</b>			
Tools to Use	<input type="checkbox"/> Automated HTML Email* <input type="checkbox"/> Program-Specific Web Page* <input type="checkbox"/> Company Home Page <input type="checkbox"/> Manual Email by Rep <input type="checkbox"/> Phone <input type="checkbox"/> Direct Mail / Letter <input type="checkbox"/> Statement Insert		
System for Action	<input type="checkbox"/> Internal Email <input type="checkbox"/> CMS* <input type="checkbox"/> HLP.Guru <input type="checkbox"/> Other _____		
Promo Code Structure	<input type="checkbox"/> Company <input type="checkbox"/> Branch <input type="checkbox"/> Staff <input type="checkbox"/> Campaign <input type="checkbox"/> Other _____		

# HLP.Guru Project Planner

Organization Name: \_\_\_\_\_

Project Contact \_\_\_\_\_

Target Implementation Date: \_\_\_\_\_

Component	Notes/Comments	Included? Yes/No	Number
<b>Systems Integration</b>			
Data Exchange	Yes / No		
Systems Included	<input type="checkbox"/> CMS* _____ <input type="checkbox"/> CRM* _____ <input type="checkbox"/> Other* _____		
<b>Administrative Portal</b>			
Initial User Set-Up	List of users provided includes: <input type="checkbox"/> Company Admin / Super-User <input type="checkbox"/> Branches <input type="checkbox"/> Managers <input type="checkbox"/> Staff <input type="checkbox"/> Other _____		
Dashboard Reports	Standard Report Set: Yes / No		
Communication Materials	Upload into HLP.Guru: Yes / No		
Gurus	<input type="checkbox"/> Agency Counselors _____ <input type="checkbox"/> HLP.Guru-Provided*		
Payment Method	<input type="checkbox"/> Method: Credit / Debit / ACH / Bill <input type="checkbox"/> Frequency: Daily/Weekly/Monthly		
<b>Marketplace</b>			
Lender List*	Yes / No		
Down Payment Assistance*	Yes / No		
Preferred Vendors*	<input type="checkbox"/> Real Estate <input type="checkbox"/> Closing Services <input type="checkbox"/> Insurance Other _____		
<b>Training &amp; Support</b>			
Delivery Method	<input type="checkbox"/> On-Site* <input type="checkbox"/> Webinar <input type="checkbox"/> Train-the-Trainer <input type="checkbox"/> Other _____		

\* these items available for an additional cost and may require additional time