



Organizing Events for Castell Project Is Easier Thanks to eWay-CRM

Castell Project is a nonprofit that aims to increase the number of female-leaders in the hospitality industry. Their mission is to identify frictions that keeps women from career advancement, and to develop training programs that overcome these obstacles, preparing them for the highest levels of leadership.

The **story of the Castell Project** is inspiring. In recent years, as initiatives have grown significantly, managing program participants and speakers brought new organizational challenges for Castell.

Deborah Cox, Castell's vice president, shared **how they managed the organization's growth effectively with eWay-CRM.**

Meeting the challenges of growth

In the beginning, Castell Project conducted research and began publishing annual reports on women in hospitality leadership. Given the significant gap in leadership representation for women, the founders researched and identified areas in leadership where women operate differently.

Studying the gap in leadership representation helped Castell determine areas in which women learn and operate differently than men. Castell's Leadership Programs grew out of the work.

The organization also wanted to influence women at the college level to consider the many roles the hospitality offers for rewarding careers. Castell@College was developed so that students would have the opportunity to hear inspiring stories about personal career experiences and rewards from female executives in the industry.

Thanks to virtual meetings Castell@College grew rapidly during the pandemic. The initiatives now visit some 60+ universities every year and has more than 300 executive women panelists that support the classroom sessions.



- **2000** students

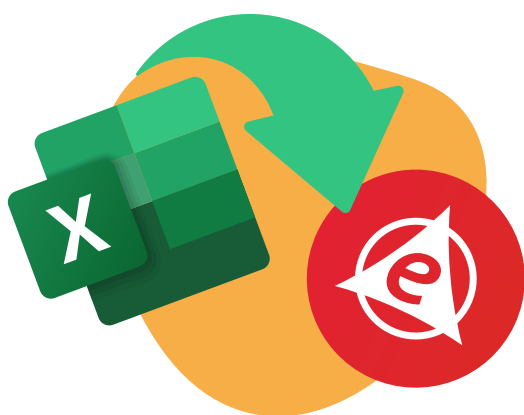
- **300** panelists

- **60** schools
virtually during
an academic year

When Excel is not enough

Castell is slowly returning to live events after the pandemic. With their growing database, Castell can match the school demographics with the panelists from diverse backgrounds – not only in terms of race, but also different areas of the hospitality industry.

Therefore, a key to Castell's contact management is the ability to easily filter the best candidate for each event and keep track of all related communications between them and schools where the events take place.



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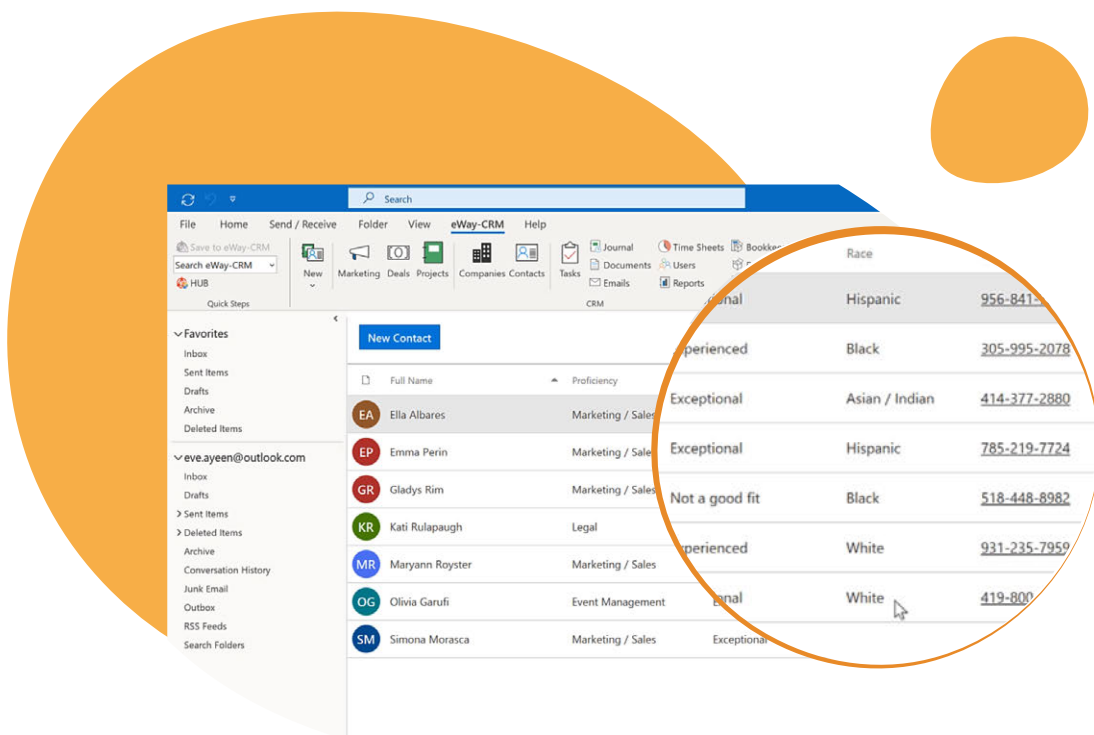
Castell@College drove the search for a CRM, because using an Excel spreadsheet wasn't adequate. So, one of our volunteers looked at various CRM solutions and recommended eWay-CRM.

Before the Castell@College program was developed, volunteers managed everything in Excel. But as the number of contacts grew, **using the Excel spreadsheet wasn't adequate.** So, Castell **started looking for CRM software that would organize hundreds of contacts effectively.**

Reasonable price and easy to learn

Even though Castell was well-funded before the pandemic happened, as a non-profit they still knew that they needed to conserve money as best they could since their industry was severely impacted. So, they needed a CRM solution that fit their budget, and eWay-CRM was among them.

It was important to consider not just the software's price, but also the learning curve. Deborah Cox, who oversaw the eWay-CRM implementation project, has worked in the software world for 25 years. But other Castell women aren't as technologically savvy. That's why **eWay-CRM has proven to be a wise choice, as it looks like Microsoft Outlook**, which they are used to working with in Castell.



Deborah and Castell's intern learned the most by simply using eWay-CRM rather than relying on tutorials. They soon established a set of guidelines for how the rest of the team would use the software as well.

Effective organization of events

The panelists and school representatives with whom Castell representatives communicate when organizing events are managed in the Contacts module. They also added categories or sponsors and custom fields for contacts because the organization needed to keep track of panelist's job functions, alma maters, ethnicity etc.

Universities and vendors are managed in the Companies module. On each University item, Castell representatives can find all related contacts, projects, or emails that Deborah and

others import to eWay-CRM. This makes it much easier to find communication related to the University, panelist, or event.



eWay-CRM has been especially helpful in forming panels and managing communication with our 300+ panelists.

The Projects module helps with planning events. When creating a new project, the coordinator can link the event to the University where it takes place, select a school representative as a primary contact person and the possible candidates for panelists. Once a Castell representative selects the ideal candidates, they can email them literally in two clicks.

The whole process of organizing events is adapted to Castell. They can easily manage and filter out the ideal candidates for events and communication with them is well organized.

Professional email tool

In the middle of the pandemic Castell Project started Fortuna's Table initiative that helps women on the path to hotel ownership. Fortuna's Table takes place virtually and Deborah sends out invitations using eWay-CRM professional email tool every 7-10 days to alert members of upcoming meetings.

At Castell they can quickly choose the respondents' list from a database of contacts by specifying certain criteria and then create a message right in eWay-CRM using an advanced editor. After sending, recipients' reactions can be tracked so Fortuna's Table representatives can see who was interested in the upcoming meeting.

Great value for money

Thanks to eWay-CRM's integration with Microsoft Outlook, Castell Project has a seamless workflow for email distribution, project management and contact management. The team can work directly within the familiar Microsoft Outlook interface, and they don't have to switch between multiple software programs for different business operations. This saves the organization a lot of time.

However, the most important thing to implement CRM successfully and thus boost the success of Castell's organization was that they could create a lot of custom identifiers since they needed to sort panelists and other contacts based on several unique criteria.

It's great that all the requirements for CRM software have been met while keeping the budget of the non-profit.