

CiviCRM for Marketers

CiviCamp Manchester



@RedHotIrons



[linkedin.com/company/red-hot-irons-limited](https://www.linkedin.com/company/red-hot-irons-limited)



[linkedin.com/in/becky-roberts-charity-comms/](https://www.linkedin.com/in/becky-roberts-charity-comms/)

For marketers

Anyone who sends mailings to...

- Raise awareness
- Promote services / activities
- Advertise events
- Highlight membership benefits
- Fundraise

A valuable tool

Email is a valuable marketing tool...

- More personal
- Customisable
- Direct
- Higher click rate than social media – some stats suggest 50-100x

Better relationships

How to build better relationships by...

- Using data you already hold
- Being targeted with CiviGroups
- Improving style and readability of your mailings
- Considering other user comms

Getting to know you

- What type of organisation do you work or volunteer for?
- What do you use mailings for?
- What tool/s do you use to send mass mailings currently?



Better relationships: Using your data

- Use data to personalise your messaging
- Information you may hold on your email contacts
 - Name, job title, employer, location
- Tokens: linking this data to your mailings
- Dependent on data put in
- Example: Encourage contacts to open your emails by personalising subject lines



Subject

Please complete our volunteering survey

</> Tokens



Subject

Becky, please complete our volunteering survey

</> Tokens



Subject

Becky please tell us about volunteering in Manchester

</> Tokens



Better relationships: Targeting

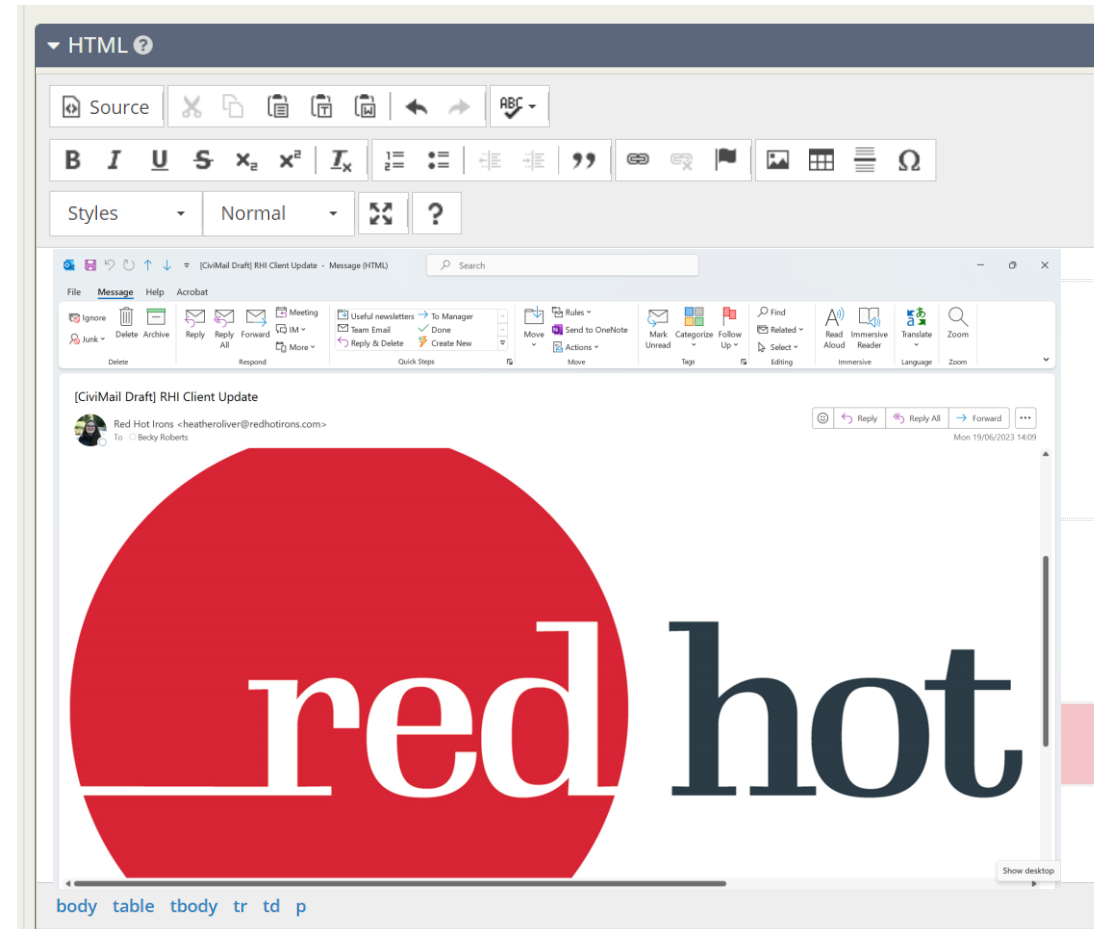
- Tailor mailings to your different CiviGroups
 - E.g. members and non-members
 - E.g. individuals vs organisations
- Use smart groups
 - Smart groups are dynamic – contacts grouped on set parameters
 - Can be used to target or exclude
- Exclude other mailing recipients



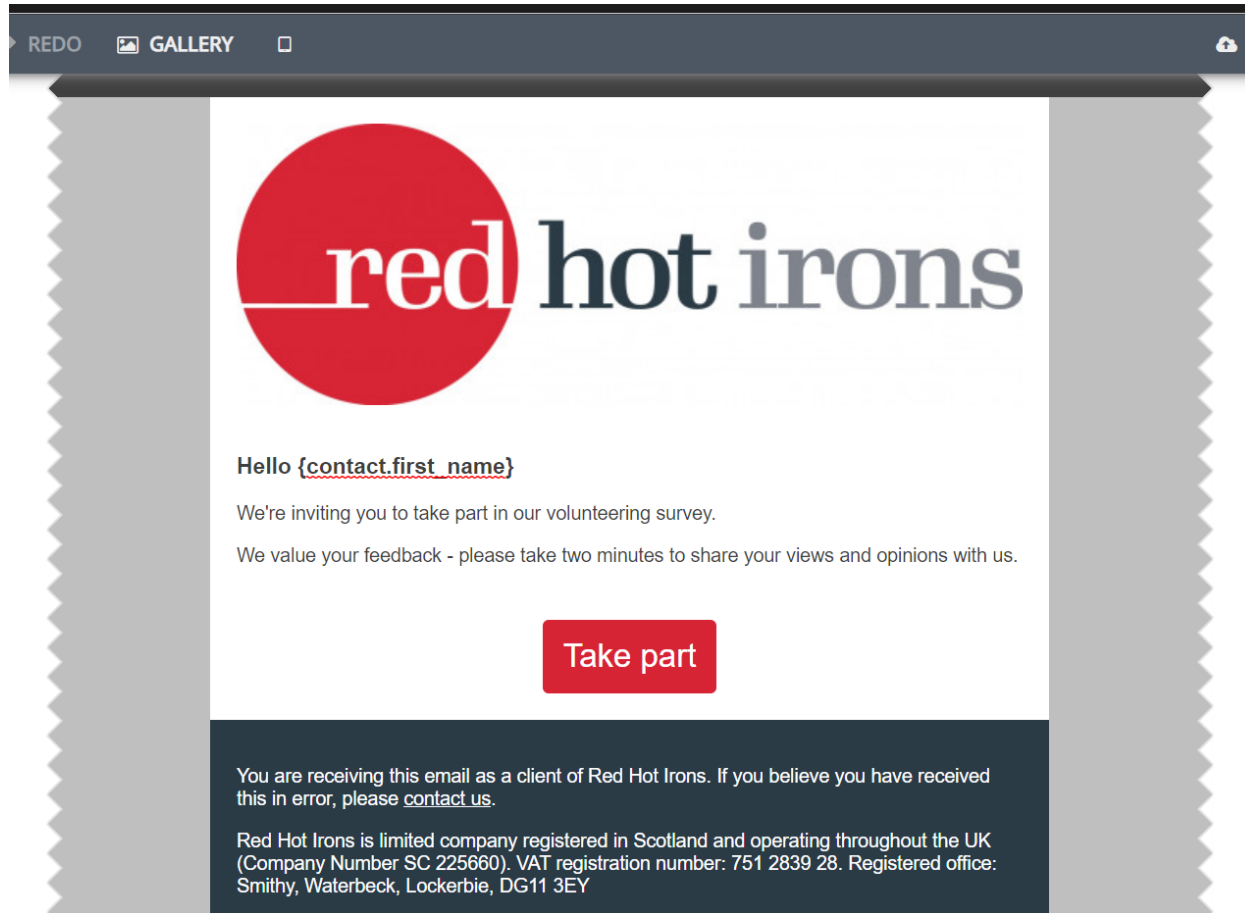
What's the difference?

CiviMail

- Default CiviCRM component
- Content added to html composer
- Basic layout
- Not responsive
- Headers and footers added separately



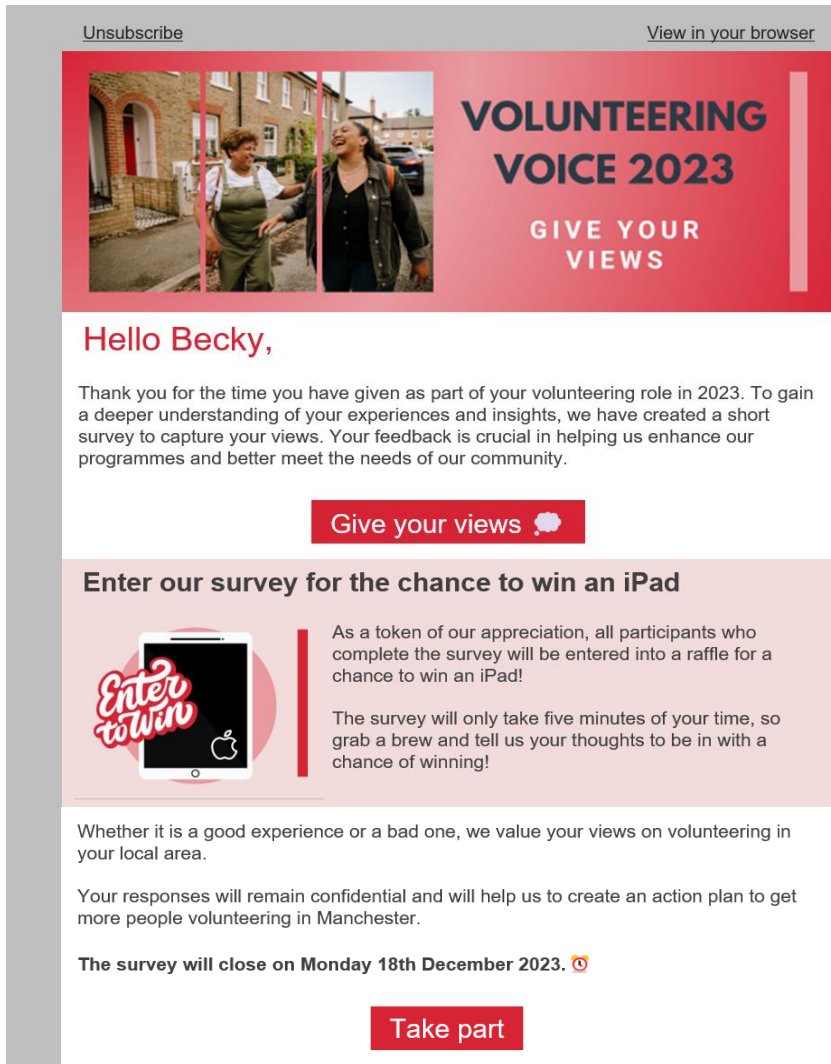
What's the difference?



Mosaico

- An extension for CiviCRM
- Drag and drop mailing builder
- Blocks allow flexibility with layout
- Responsive
- Pre header is a block

Mosaico mailing – styling and readability



Header conveys what the message is about

Personalised greeting

Clear call to action

Text broken up into easy-to-read

Make your highlight stand out

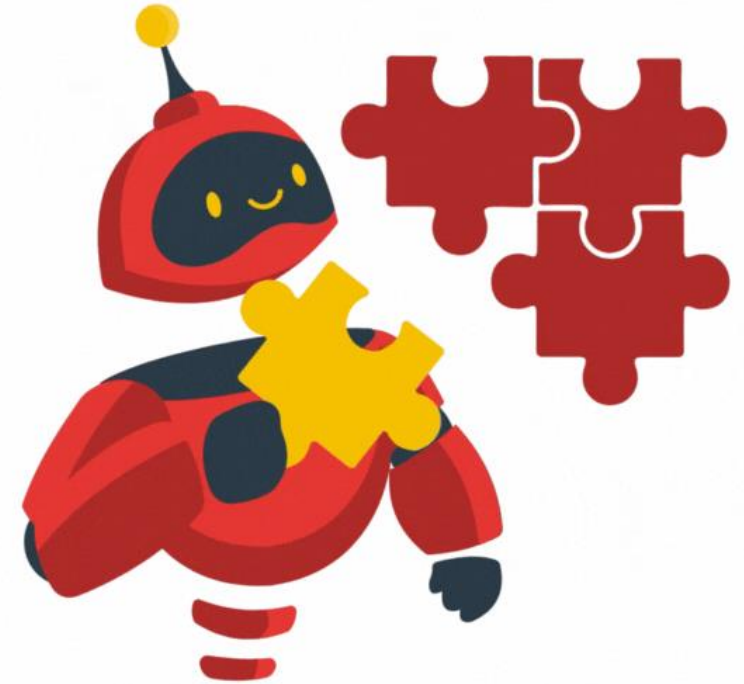
End on your key message



Example one: Training, templates and Canva

***Scenario:** many people are involved in delivering your organisation's training programme – comms, admin and development.*

You want to ensure your communications look consistent – regardless of who sends them – to help to reinforce that your organisation is professional and a trustworthy provider.



Example one: Training, templates and Canva

- Map out the templates needed:
 - Marketing – including launch
 - Registration information/reminders
 - Evaluation
 - Follow up resources
- Templates are just an outline – content / details can be added later



Example one: Training, templates and Canva

- Ensure consistent style across the templates:
 - Same colours for titles, subtitles and buttons
- Create simple graphics
 - Use Canva to create and share design with the team
 - Create a repository of images or allow access to edit designs
- Brief team on how to use the templates





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Projects > Red Hot Irons > Images for mailing templates

Share icons: Add new, Share

Images for mailing templates

Newest edited

Back to Home

All projects

Recent

Images for mailing tem...

Red Hot Irons



Three column image - 166px

166 x 90 px



Two column image - 258px

258 x 100 px



Medium side image block - 166px

166 x 130 px



Large image block - 535px

534 x 200 px



Header image - 570px

570 x 200 px

Invite members

Trash





- Design
- Elements
- Text
- Brand
- Uploads
- Draw
- Projects
- Apps
- Photos
- Audio
- Videos

Position

0 10 20 30 40 50 60 70 80 90 100 110 120 130 140 150 160 170

Page 1 - Add page title

Page 2 - Add page title



- Design
- Elements
- Text
- Brand
- Uploads
- Draw
- Projects
- Apps
- Photos
- Audio
- Videos

Position

0 10 20 30 40 50 60 70 80 90 100 110 120 130

Page 2 - Add page title



Page 3 - Add page title



Download

File type

PNG **SUGGESTED**

Size x

332 x 180 px

Transparent background

Compress file (lower quality)

Select pages

All pages (3)

Save download settings

Download





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Red Hot Irons

Brand Kit shared with: Red Hot Irons Add to a folder

Back to Brand Hub

Red Hot Irons

Logos

Colours

Fonts

Photos

Graphics

Icons

Logos (3)

+ Add new



RHI-Vertical-Color.png Image · 7 months ago



RHI-Round-Grey.png Image · 7 months ago



RHI-Round-Color.png Image · 7 months ago

Colours (4)

+ Add new

RHI Colour Palette



#d72435



#ffffff



#2b3b46



#D72435

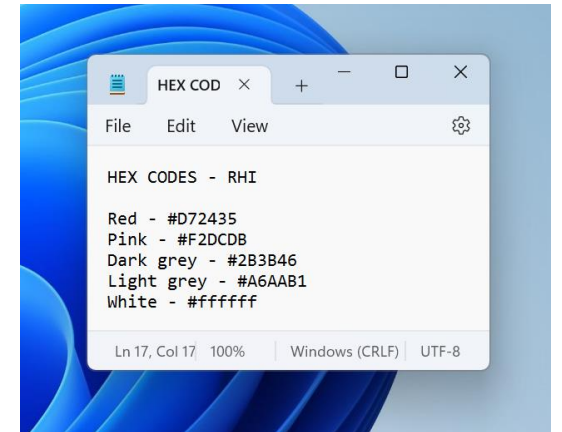


Add new

Fonts

+ Add new

+ Invite members



Example two: Scheduled reminders and membership

Scenario: your organisation provides a wide range of services, events and online resources for your members.

You want to increase the number of your members who are aware of and take advantage of these benefits of membership to improve their membership experience and likelihood of renewing.



Example two: Scheduled reminders and membership

- Identify the benefits of membership you want to promote:
 - Create a Mosaico template for each
- Schedule reminders throughout annual membership journey
 - Benefits of membership will be communicated to members x number of days/weeks/months after joining or renewing
- Remember the dates are relative not fixed



Save
 Cancel

Title *

Entity

- membership type -
- PCRS Membership
- Honorary
- Corporate Supporters
- Z - Back Office Membership

When (trigger date) OR
 month(s) after

Record activity for automated email or SMS

Repeat Enable repetition.

Effective start date
 Earliest trigger date to *include*.

Effective end date
 Earliest trigger date to *exclude*.


From Name

From Email

Limit or Add Recipients

Send as
 Scheduled Reminder Active

EMAIL SCREEN
 Use Template



PCRS Member

Primary Care Respiratory Society

Inspiring best practice in respiratory care

A network of passionate respiratory professionals


Dear Becky,

Did you know as a member of PCRS you are part of the UK's largest network of dedicated respiratory professionals working in primary, community and integrated care settings?

You can connect with this community via your online dashboard. Our online directory allows you to reach out to other members in your area, and gives you access to peer support and advice. Log in to view the directory, if you've forgotten your password you can [reset it here](#).


Visit your dashboard

Support from your peers



PCRS Conference and Events

PCRS runs a diverse programme of virtual and face-to-face events, including our [Annual Conference](#), which is a great opportunity to catch up with friends and colleagues, and make new connections. The next PCRS Conference will be held in Telford on the 21st-23rd September 2023, we hope you will be able to join us! Head to our [events feed](#) to browse all of our upcoming events.



Peer Support Networks

Being responsible for improving respiratory care for patients can be both daunting and challenging. Joining a local network can help with workplace isolation and support you in your role - meet and learn from peers, share insights and questions, and get up to date on best practice. [Search for your local peer support network](#) on the PCRS website.



Gather around the CiviCamp Fire

Any questions or anything to share now?
Or find me later for a Mosaico or Canva chat by the CiviCamp fire!



Useful tools

- Grammarly – grammar check tool
- Canva – design tool
- Mail-tester - test the spammyness of your emails
- Send Check It – rates your subject lines
- Unsplash – free image library
- WebAIM contrast checker – check your foreground and background colours
- Age-positive image library - positive and realistic images of people aged 50+
- W3schools html emoji reference – for adding emojis to your mailings



Thank you!

**If you have any queries
or questions, get in
touch with us:**

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