

# Increase donations with workflow automation

**Sofia Dimas, Neon One**  
July 13, 2021



# Housekeeping

1

**This is being recorded.** Our webinars are all recorded for future reference and placed into the Neon One website under the Resources / Events section by tomorrow.

2

**We will be taking questions.** We want this to be an actionable resource for your organization, so please use the Q&A!

3

**We'll focus on practical usage of this powerful Neon CRM tool.** We won't be getting deep into a training or comprehensive strategy, just the basics of how workflow automation works in Neon CRM

4

**There is so much more workflows can do than what we'll show!** We've gotten a ton of requests to give an overview of this feature but the possibilities are endless.

# Overview

**Target Audience:** Neon CRM clients and prospective users who are looking to understand how workflow automation can save time and create deeper connections.

## What You Will Learn:

- The importance of understanding and utilizing workflow automation in your work
- The top types of automation that your organization can deploy immediately
- How workflow automation gets done within Neon CRM
- How to get started with automation today

## What You Won't Learn:

- A deep training on workflow automation's nuances and configurations. We'll just be covering the basics today!
- We'll be focusing on the Workflow Automation feature. There's a ton of automation for email in System Emails. We'll touch on that SUPER quickly just so you know, but we'll be focusing on a specific feature in Neon CRM.

# Sofia Dimas

## Neon One

- 10+ years of experience in SaaS, CRM, Email Marketing, Digital Advertising
- Led various volunteer groups in Chicago for causes focused on education and community development
- The first language I spoke was Greek — I learned English from Sesame Street

### Contact Information

Email: [sdimas@neonone.com](mailto:sdimas@neonone.com)

Book A Demo w/ Sofia Directly

<https://meetings.salesloft.com/neonone/c/sofiadimas>



1. *Overview - why does automation matter?*
2. What automation is and what it is not
3. Top workflows your organization should consider
4. Walkthrough on how these workflows get set up in Neon CRM
5. Conversation Time

# Automation - The Basics

# What exactly is workflow automation?

Workflows are automated sequences of actions that replace manual work, data entry or communications.

Modernized software focuses on three key interaction points for a workflow automation:

1. **Trigger** - something to make the workflow start
2. **Targets** - who is the workflow designed to focus on?
3. **Actions** - what actually happens during the workflow



# Why prioritize workflow automation?

Nonprofits are strapped for time — and they need tools like automation to be more productive.

Most automation software is built for for-profit companies and could cost you thousands of dollars per month. But we redesigned those tools specifically for nonprofits, and are making it affordable for you.

Biggest Benefit

74%

How much time they are saving

Nonprofit Professionals Like You

86%

Doing extra work that they weren't hired for

Donor Expectations

70%

Are expecting a personalized engagement experience



A word about System Emails

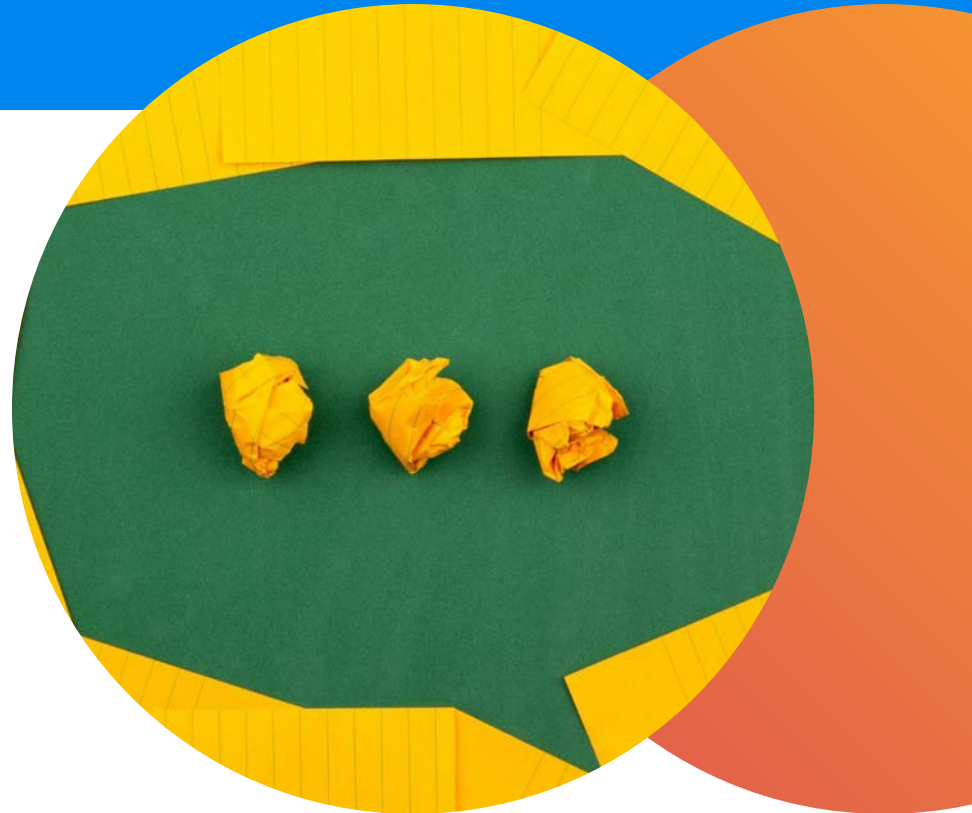
# System Emails do a lot!

Many systems on the market offer some sort of email trigger offering and Neon CRM is no different.

When getting RSVPs for today's webinar, some of the suggestions we received related to functionality easily achieved using System Emails (and Letters too!)

We'll touch on where to find these types quickly today:

- **Donation Receipts**
- **Membership Due Reminders**
- **Event Reminders**



What are the top workflows to consider using at your nonprofit?

# Mid Level Donor Engagement

1

## Donation Triggers

Happens at the time of the action

2

## Targets donation amount

Mid-level can have differing definitions but generally is falling between \$100 to \$1000 in terms of a range.

3

## Actions are comms focused

Mid-level donors will benefit from a personal touch, so calls or personalized emails from staff are great actions to take

# Donation Anniversary Call

1

## Donation Date Triggers

Is conditional around when these donations are being made.

2

## Targets can be honed here

Depending on your donation ebb and flow throughout the year, it may make sense to pool these calls into a monthly list

3

## Actions are time delayed

Time delays are powerfully programmed within Neon CRM down to minutes, so utilize them to their full potential

# 30/60/90 New Donor Check In

1

## **New donation triggers**

This will focus only on new donors to your organization, which tend to have a low retention rate

2

## **Focus on ALL new donors**

This is a critical workflow to think through in all its parts since it can mean the difference in keeping people for years or losing money

3

## **Actions are time delayed**

Multiple time delays and some automated communications will really change your stewardship approaches

# Board Report - Events!

1

## Event Date Triggers Action

Mapping out all the important moments in your giving calendar helps plan out automations like this

2

## All events or just board ones?

Asking the board for what type of reports they want will help cut down on automations that won't help move planning forward

3

## Actions can be internal only

Not everything you use a workflow for needs to communicate with a supporter.

# New Donor Welcome Series

1

## Another New Donor Workflow

When mapping out workflows, chart out communication forks / plans that may overlap with each other

2

## Targeting new donors is key

We cannot stress enough the importance of new donor retention. The sooner you engage and receive a 2nd gift, lifetime value goes up

3

## Actions can be personalized

Especially since you can add IF / THEN forks for your actions, chart out copy that leans into as much personalization as possible



# Wealth Screening Update

1

## Windfall can trigger workflows

Every two weeks, our Windfall integration scans the entire Neon CRM database. Why hunt for new information?

2

## Focus on affinity building

Windfall data can be filtered so you can focus on both affinity and affluence data

3

## Automatically assign Prospects

Free up prospect research time by your team by focusing on the most high potential major donors in your CRM

# Pledges Due

1

## Triggers are more than cash

Being able to manage the flow of pledges being made can make a major difference in your annual fund planning

2

## Filter things if needed

How are you managing pledges? Are only multi-year ones needing a high touch or every pledge should have engagement?

3

## Tons of comms automation

Lining up different communications around your pledge management will be a gamechanger in your pipeline

# Workflows in Neon CRM

# Follow Up



Potential Client?

Email: [sdimas@neonone.com](mailto:sdimas@neonone.com)



Current Client?

Email: [clientsuccess@neonone.com](mailto:clientsuccess@neonone.com)

# Neon One Resources

## Workflow Automation

A collection of resources that will help your organization with workflow automation and Neon CRM's powerful tools to enable it..



### Advanced Training

Take the Neon One Academy course designed specifically for taking your workflow automation to the next level. [Learn more here.](#)



### Workflow Basics

Need a bit of a refresher beyond today's webinar on how Workflows, well, work? Check [out the Neon CRM guide here.](#)



### Moves Management Checklist

Workflow automation is key to helping take moves management to the next level. Take a look at our checklist to help chart out engagement at every stage. [Download here.](#)

Built for Good.