



#AutoNeon
@NeonCRM

Product Update Webinar:

Workflows: Using Automation to Build Capacity



Agenda

#AutoNeon
@NeonCRM

- About me
- What are Workflows?
 - Triggers
 - Targets
 - Actions
- Why automation?
- Why do nonprofits need automation?
- Live demo
- Pricing & next steps



Housekeeping items

#AutoNeon
@NeonCRM

- Webinar is being recorded & will be sent out after
- Everyone gets one Workflow for free
- If you want more, there will be pricing and we will cover that in more detail later!
- Stick around to the end!



About me

#AutoNeon
@NeonCRM



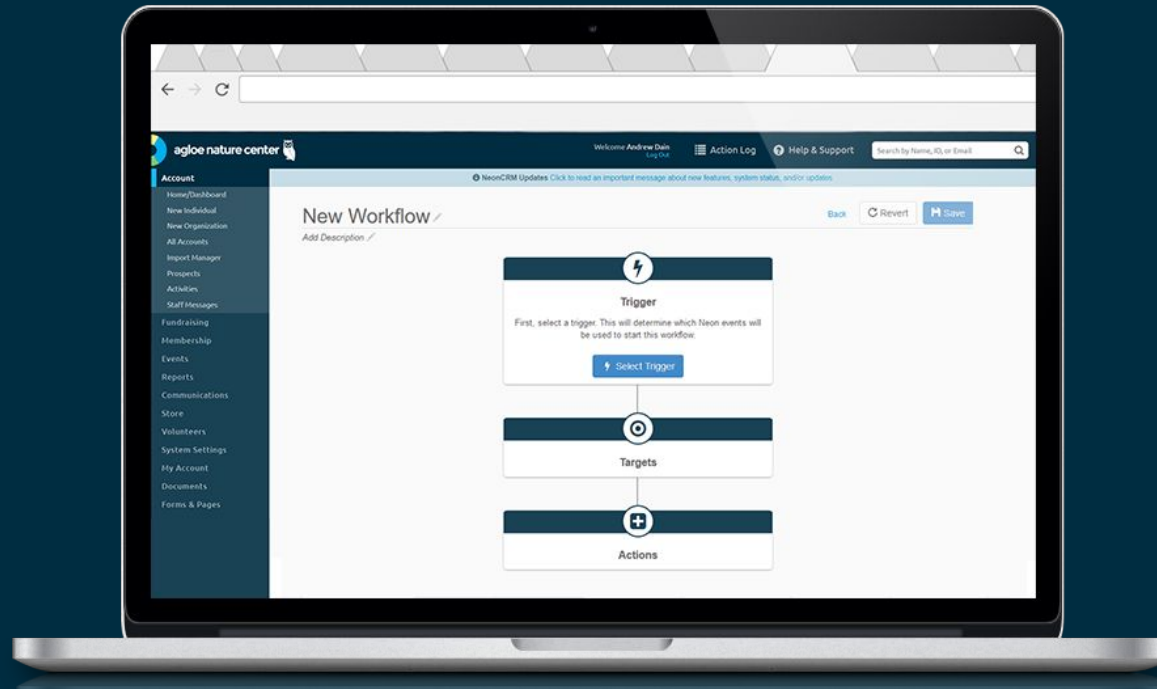
Tim Sarrantonio

DIRECTOR OF BUSINESS DEVELOPMENT

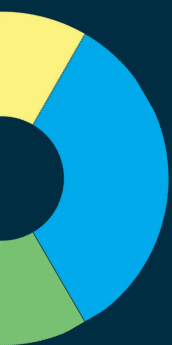
- 13+ years working for nonprofits
- Raised over \$3 million
- Raiser's Edge, Salesforce background
- Current NeonCRM admin

What are Workflows?

#AutoNeon
@NeonCRM



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



What are Workflows?

#AutoNeon
@NeonCRM



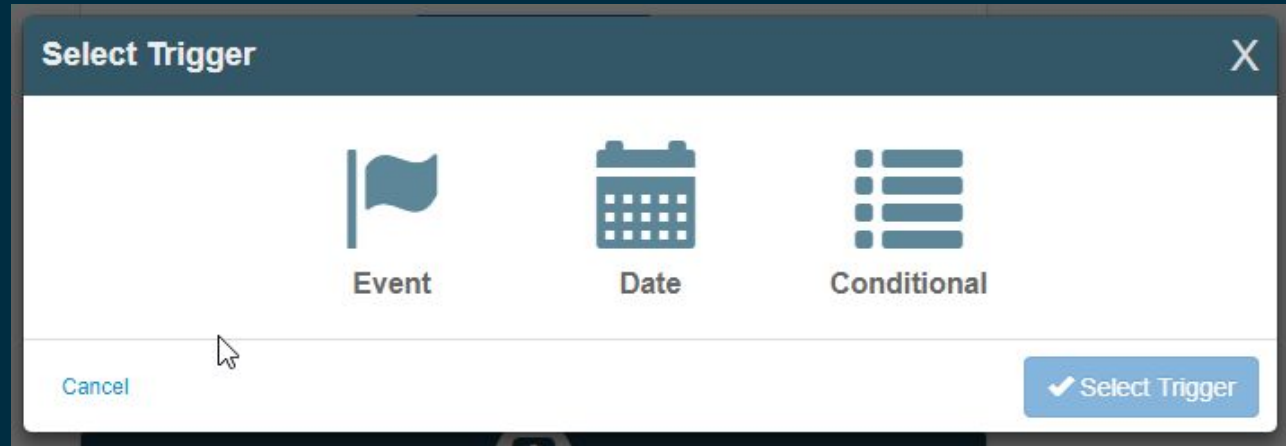
1.
Trigger



2.
Targets



3.
Actions





What are Workflows?

#AutoNeon
@NeonCRM



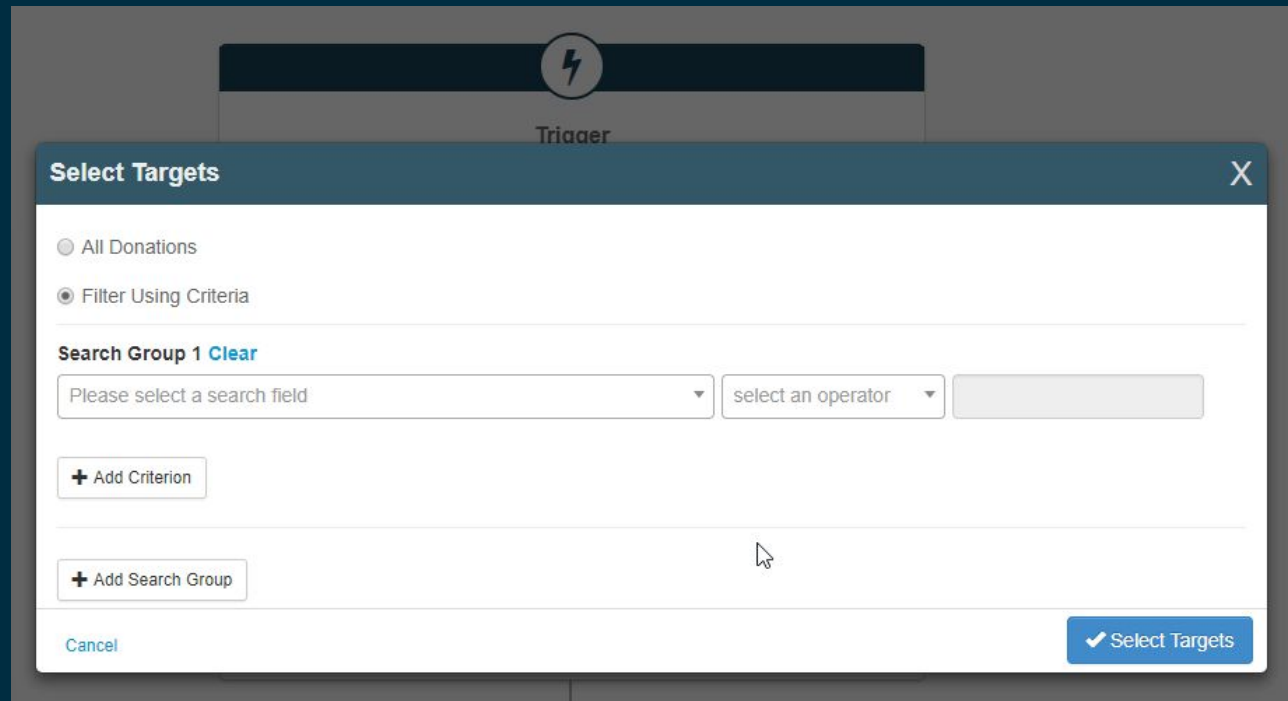
1.
Trigger



2.
Targets



3.
Actions



What are Workflows?

#AutoNeon
@NeonCRM



1.
Trigger














2.
Targets



3.
Actions

Add Actions

 Send Internal Email Sends an email to one or more System Users of NeonCRM with a custom message.	 Send External Email Sends an email to one or more constituents with a custom message.
 Create Activity Creates an activity and assigns it to a System User.	 Assign Prospect Assigns the account in the workflow as a prospect to a System User.
 Add Time Delay Adds a delay between steps. This is particularly useful before an If/Then Branch.	 Update Account Field Updates the Individual Account Type, Organization Account Type, or an Account Custom Field for the account in the workflow.
 Email Report Emails a report to the account in the workflow to one or more constituents or System Users of NeonCRM.	 Add to Volunteer Group / Project Adds the account in the workflow to a Project or Volunteer Group.
 Mark as Favorite Marks the account in the workflow as a favorite to a specific System User of NeonCRM.	 Add Account Note Adds a note to the account in the workflow.
 If/Then Branch Uses criteria to decide which of two groups of actions are performed on the account as it continues through the workflow.	

Cancel ✓ Add Action



Why automation?

#AutoNeon
@NeonCRM

74%

of automation software users say that the amount of **time they save** is the biggest benefit

(Source: Adestra)

Users of automation software generate **2X the number of leads** than those using email blast software — and are perceived by their peers to be **2X as effective at communicating**.

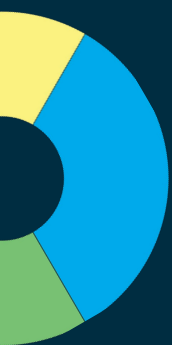
(Source: Autopilot)

Of consumers in the U.S., **70% expect personalized** communications.

(Source: AgilOne)

Trigger-based, personalized emails have **95% higher open rates** than those of mass email blasts.

(Source: eMarketer)



Why do nonprofits need it?

86%

of nonprofit staff who say they do “extra work” outside of their actual job description

(Source: Opportunity Knocks)

The bottom line:

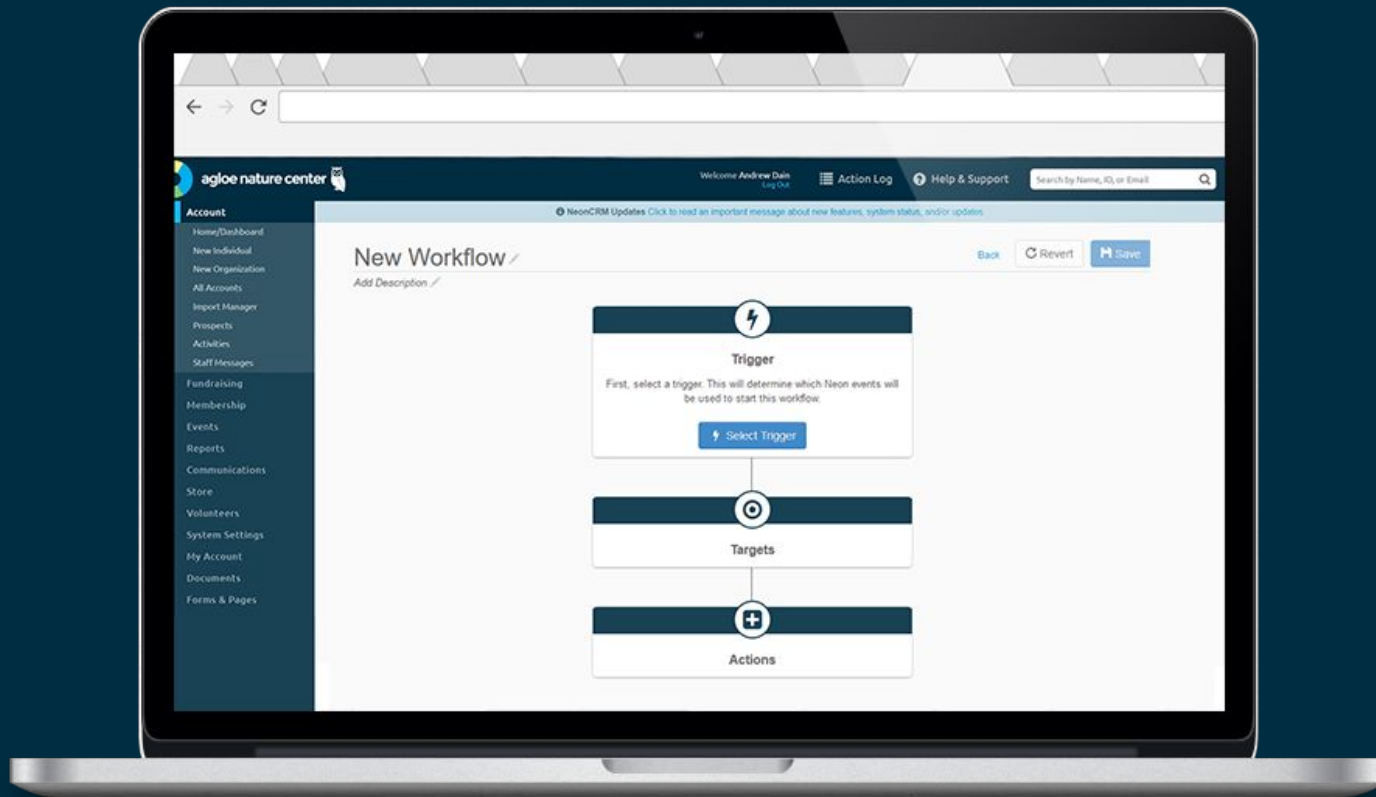
Nonprofits are strapped for time — and they need tools like automation to be more productive.

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.



Demo

#AutoNeon
@NeonCRM





Next steps

#AutoNeon
@NeonCRM

Workflows

Workflows allow automation of common tasks to streamline the NeonCRM experience. Open an existing or create a new Workflow below.

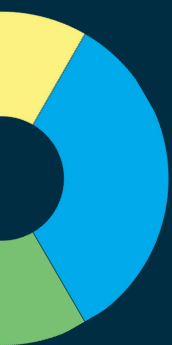
Show: All

[+ New Workflow](#)

Name	Created	Completed Workflows	In Workflow	Status	Date Range	Actions
Copy of Individual Type Test	02/22/2018 05:19 p.m. By: Andrew Dian	0	0		-	
Donation Test	02/19/2018 10:26 a.m. By: z2Administrator	0	0		-	
Event reminder email to attendees	02/21/2018 01:32 p.m. By: Kristina Jakstas	0	0		-	
Individual Type Test	02/19/2018 10:43 a.m. By: z2Administrator	2	0		-	
Membership Approval Process Create an activity to review all incoming mem...	02/15/2018 02:45 p.m. By: Jamie A	10	0		-	
New Pledges For regular pledges (not matching pledges), s...	02/20/2018 01:34 p.m. By: Kristina Jakstas	0	0		-	
Social Fundraising \$500 or more	02/15/2018 05:19 p.m. By: John Doe	0	0		-	
Volunteer application Update Individual Type and trigger emails whe...	02/13/2018 04:39 p.m. By: Kristina Jakstas	1	0		-	

1-8 of 8 items | 25 Per Page | Page 1 of 1

- All Neon clients receive one Workflow to start
- Upgrade for additional Workflows (up to 15 or 50)
- Contact Client Success or Sales with questions



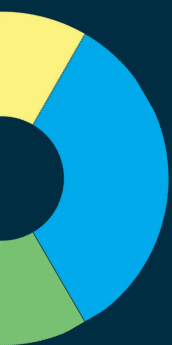
Pricing

#AutoNeon
@NeonCRM

MONTHLY FEES

	Up to 15 Workflows	Up to 50 Workflows
UP TO 1,000 RECORDS	\$25	\$50
UP TO 5,000 RECORDS	\$50	\$75
UP TO 15,000 RECORDS	\$100	\$150
UP TO 25,000 RECORDS	\$150	\$200
UP TO 50,000 RECORDS	\$250	\$300
UP TO 100,000 RECORDS	\$350	\$450
UP TO 250,000 RECORDS	\$500	\$700

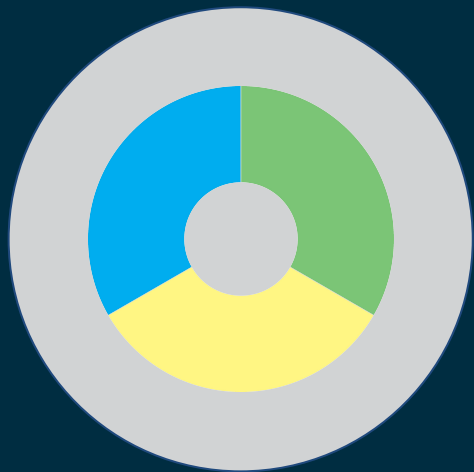
The monthly fee for workflows is an add-on to the cost of your NeonCRM package. For more information, visit our [pricing page](#) or get in touch with a Nonprofit Sales Consultant.



Contact

#AutoNeon
@NeonCRM

Current clients:



clientsuccess@neoncrm.com

Prospective clients:



sales@neoncrm.com

#AutoNeon
@NeonCRM



Questions?