Using CiviCRM - Second Edition

Erik Hommel, Joseph Murray, Brian P. Shaughnessy

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Develop and implement a fully-functional, systematic CRM plan with CiviCRM

About This Book

- Develop an integrated online system that manages contacts, donations, event registrations, memberships, bulk e-mail, campaigns, case management, and other functions such as activity tracking, grant distribution, and reporting.
- Plan a constituency relationship management strategy with ladders of engagement that will improve how your organization realizes its mission.
- Use case studies and step-by-step examples to put the raw concepts into real-life terminology and build your solutions.

Who This Book Is For

The book is primarily for administrators tasked with implementing, configuring, maintaining, and updating CiviCRM, and staff users who are looking to better understand the tools available in order to become power users. CiviCRM is software that may be used by advocacy groups, non-profit, and non-governmental organizations, elected officials, professional and trade associations, government entities, political campaigns and parties, and other similar organizations, and this book will prove useful to all such users.

What You Will Learn

- Install and configure your CiviCRM
- Analyze your current workflows and processes to translate them effectively into the CiviCRM model
- Build an integrated system to solicit, retain, and manage your donors and members through robust management and reporting tools for administrators
- Raise more money with CiviCRM with effective solicitation campaigns
- Market events effectively and track registrations and payments
- Improve communications with constituents using targeted broadcast e-mail campaigns
- Track ongoing communications with constituents including from Outlook and Gmail using activities and case management tools
- Take advantage of the many CiviCRM tools to generate both simple and complex event structures and manage registrants through every phase of the project

In Detail

CiviCRM provides a powerful toolbox of resources to help organizations manage relationships with constituents. It is free, open source, web-based, and geared specifically to meet the constituent relationship management needs of the not-for-profit sector.

Beginning with broader questions about how your organization is structured, which existing workflows are

critical to your operations, and the overarching purpose of a centralized CRM, the book proceeds step by step through configuring CiviCRM, understanding the choices when setting up the system, importing data, and exploring the breadth of tools available throughout the system.

You will see how to best use this software to handle event registrations, accept and track contributions, manage paid and free memberships and subscriptions, segment contacts, send bulk e-mails with open and click-through tracking, manage outreach campaigns, and set up case management workflows that match your organization's roles and rules. With specific emphasis on helping implementers ask the right questions, consider key principals when setting up the system, and understand usage through case studies and examples, the book comprehensively reviews the functionality of CiviCRM and the opportunities it provides.

With this book, you can help your organization better achieve its mission as a charity, industry association, professional society, political advocacy group, community group, government agency, or other similar organization and position yourself to become a power user who efficiently and effectively navigates the system.

Style and approach

This guide is packed with step-by-step tutorials and real-life examples interspersed with practical advice and best practices on how to use CiviCRM strategically. You will be able to quickly grasp and implement the basic elements of CiviCRM before moving on to more advanced tools.

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