

Fundraising campaign automation

This workflow automatically launches targeted fundraising campaigns based on donor behavior and preferences, managing the entire campaign lifecycle from segmentation to follow-up communications.

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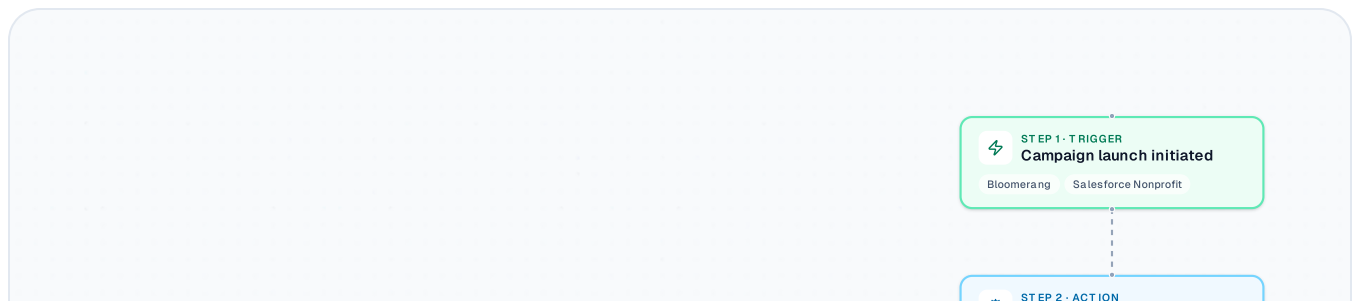


WORKFLOW TRIGGER

A fundraising campaign is scheduled to launch or a significant donor milestone is reached

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Campaign launch initiated

A scheduled fundraising campaign date arrives or a donor reaches a significant giving milestone. This triggers the automated campaign workflow to begin.

2

 ACTION

Segment donor database

Automatically categorize donors based on giving history, engagement level, and demographics. Create targeted segments for personalized campaign messaging.

DonorPerfect

EveryAction

3

 ACTION

Generate personalized content

Create customized email templates and donation pages for each donor segment. Personalize messaging based on previous giving patterns and interests.

Neon CRM

Network for Good

4

 DECISION

Determine communication channel preference

Analyze donor communication history to decide whether to send via email, direct mail, or social media. Route donors to their preferred communication method.

Bloomerang

EveryAction

5

 ACTION

Deploy campaign materials

AI Business OS

Send personalized fundraising messages through selected channels and activate online donation forms. Schedule automated follow-up sequences based on donor response.

Salesforce Nonprofit

Network for Good

6

 ACTION

Track engagement and donations

Monitor campaign performance in real-time including open rates, click-through rates, and donation conversions. Update donor records with campaign interactions.

DonorPerfect

Neon CRM

7

 OUTPUT

Generate campaign performance report

Compile comprehensive analytics on campaign success, donor response rates, and revenue generated. Create automated thank-you messages for new donors.

Bloomerang

Salesforce Nonprofit



Outputs

- Segmented donor lists with personalized messaging

- Multi-channel campaign deployment

AI Business OS



Key Metrics

- Campaign open rates
- Donation conversion rate
- Total funds raised per segment



Tools & Integrations

- Bloomerang
- Salesforce Nonprofit
- DonorPerfect
- Neon CRM
- EveryAction
- Network for Good

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