

Mailings and Automation in CiviCRM®

A smarter way to
increase engagement.

**A comprehensive guide to streamlining
your email communications.**

For charities and non-profit organisations in the UK, communication has always been central to success.

Whether it's keeping members engaged, mobilising volunteers, or inspiring donations...

★ Delivering the right message at the right moment can make all the difference.



But isn't social media more effective than email these days?

No! Despite the ubiquity of social media, email remains one of the most trusted and effective ways to connect with supporters.

- ★ You can utilise your social media channels to drive sign-ups to your email list.
- ★ You can use the power of automated email for really targeted and cost-effective engagement.

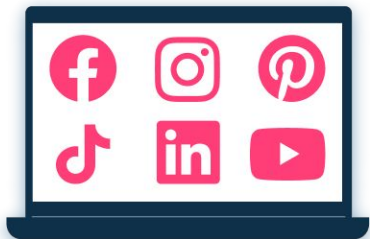
Unlike platforms where algorithms decide who sees your message, **email lands directly in the inbox.**

It gives you control, consistency, and reach at relatively little cost.

For non-profits managing tight budgets, that balance of impact and affordability is hard to beat.

The challenge, however, is one of time. Sending confirmations, reminders, follow-ups, and 'thank yous' quickly becomes an administrative burden.

That's where email automation comes in.



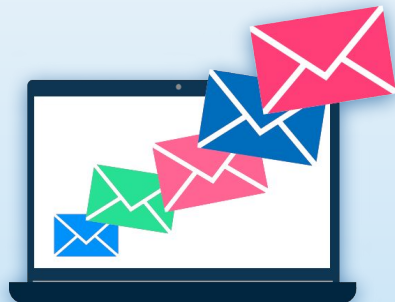
What are the key benefits of automated mailings?

Automated mailings can really supercharge your engagement strategy.

You can see exactly who's opening, clicking, and engaging. This means your efforts aren't based on guesswork. You can refine your strategy, learn, and keep improving.

Email also scales with your needs. Whether you're sending a small, targeted message to a volunteer group, or running a fundraising campaign to thousands.

★ **The same tools adapt seamlessly.**



Reinforces your shared purpose

High return on investment.

Strengthens your relationships with donors and members.

Mobilises your volunteers at key moments.

Builds a sense of community around your mission.

Keeps people connected to your cause.

It's measurable:
Report on your results, refine and improve.

Scales easily:
From small, targeted campaigns to major events.

Automation = Making better use of the tools you already have.

Automating your mailings in CiviCRM take the hassle out of repetitive tasks. Confirmations, reminders, and follow-ups go out at the right time, every time; reducing errors and creating a richer experience for your supporters.

And because automation is built directly into CiviCRM, your communications are fully connected to the rest of your data.

With everything in one place, reporting is simpler and insights are easier to uncover.



- ★ Tailor groups for meaningful communication.
- ★ Trigger nurturing emails at key moments.
- ★ Send thank you emails automatically.

- ★ Automate onboarding journeys.
- ★ Automate personalised confirmations and follow up messages.
- ★ Spend less time on repetitive tasks.

- ★ Easily build reports.
- ★ Data-driven insight into the true impact of your efforts will enable you to maximise future results.
- ★ Reduce errors.

Sending targeted and personal mailings.

Now for the detail!!

1. Contact Segmentation with Groups

CiviCRM's group feature makes it easy to target the right people with the right message. You can create static groups (manually managed) or smart groups (dynamically updated as data changes).

For example, you might create a static group for staff and a smart group for current members. This ensures supporters get communications that are relevant to them, while saving you valuable time.

★ **The benefit is precision: Your mailings reach exactly the audience you need, without constant manual updates.**

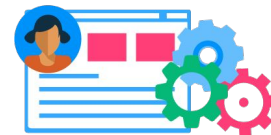


2. Personalisation using Tokens and Mosaico

Tokens bring mail merge to life in CiviCRM, automatically inserting supporter details into your email. Eg. names, addresses, or custom fields.

Combined with **Mosaico, CiviCRM's responsive email builder**, you can send professional, personalised messages without coding skills. Features like drag-and-drop blocks, live previews, and social media icons make design fast and intuitive.

★ **The benefit: Better-looking, more personal communications that increase supporter engagement.**



Top Tip!

Token Usage and Missing Data: Tokens rely on complete contact data. If a field is empty, the token will appear blank. The simple solution is to use defaults, eg. showing “supporter” when a first name is missing. For advanced users, CiviCRM's smarty feature adds flexibility to set these conditions automatically. The benefit is consistency: polished, professional emails that never leave gaps, even when your data isn't perfect!

Supercharge your mailings with advanced automation.

3. Sending Individual and Bulk Emails

With CiviCRM you can send both one-to-one emails and large scale bulk mailings directly from your database. Every interaction is logged for future reference, and privacy preferences are automatically respected. Using CiviMail with Mosaico templates, you can test messages, schedule delivery, personalise subject lines, and even attach files or include response options.

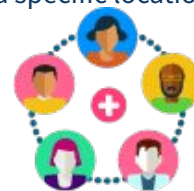
★ **The result is efficient, compliant communication that strengthens supporter records and makes reporting a breeze.**



4. Automation with Scheduled Reminders and CiviRules

Routine follow-ups don't need to be manual. **Scheduled reminders** in CiviCRM automate event confirmations, membership renewals, or even birthday messages. For more advanced journeys, **CiviRules** triggers tailored actions based on supporter behaviour. Like sending a thank-you note after a large donation or a tailored email for supporters in a specific location.

★ **The benefit is a seamless supporter experience: timely, relevant communications without adding to your workload.**



SMS Conversations: Beyond email, CiviCRM supports two-way SMS conversations. With the **SMS conversation extension**, you can run branched dialogues; asking questions like “Do you prefer cats or dogs?” and you can tailor the next step based on their reply. Data is stored directly in the contact record, helping you build richer supporter profiles. The benefit is mobile engagement that feels personal and interactive.

Build your strategy using reader journeys and workflows.

5. Strategies for Engaging Newsletters

Effective newsletters balance clarity and engagement. The method: keep content concise, use consistent branding, and tailor sections to segmented audiences.

Well-structured templates reduce production time while shorter items with “read more” links keep readers interested.

- ★ **The benefit is measurable: higher open and click-through rates, stronger supporter loyalty, and a clearer picture of what resonates with your audience.**



6. Optimising Delivery and Complex Journeys

CiviCRM gives you control over how and when emails are delivered. Scheduled reminders can pace complex journeys. While reporting tools identify your most engaged readers, who open or click, so you can add them into follow-up groups. With **CiviRules**, you can refine this further, creating sophisticated donor stewardship campaigns.

- ★ **The benefit is relevance: instead of blasting everyone with the same content, you build tailored journeys that respect capacity and increase impact.**



So, to conclude...

Using CiviCRM's email and automation tools isn't just about saving time.

It's about creating smarter, more personal connections with your supporters.

From targeted groups to personalised templates, from automated journeys to interactive SMS, everything works seamlessly within one system.

★ **The result:**

- Less admin
- lower costs
- Communications that build loyalty and lasting impact.



Next steps

- ★ Have a play and test things for yourself on our new Civi360 Demo Site: <https://demo.civi360.com>
- ★ Get in touch to see how this could all work for you on your system. Or just to talk through your specific goals.
- ★ Book a more indepth training workshop
- ★ See more tutorials on our Youtube channel: <https://www.youtube.com/@circleinteractive622>

Contact us at:

clientservices@circle-interactive.co.uk



Find out more about Civi360,
our new cloud based CRM

www.civi360.com