



VML

Customer/Constituent Management  
With RedHen and Mailchimp

DrupalCorn 2013



# INTRODUCTION

# Introduction



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**VML**

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## Goals

- RedHen structure and functionality
- Basic CRM functionality
- Benefits of a native Drupal CRM
- Integration of the website and email platform (MailChimp)





## WEM

- Content optimization
- Multi-channel management
- Conversational engagement
- Demand generation
- Sales automation



## WEM - Goals

- Understand your constituents
- Communicate effectively
- Personalized interaction
- Consistency across channels



# Agenda

- RedHen setup and basic usage
- Integration with the rest of the website
- Events and registration
- Using MailChimp for campaign emails



## Example Site

- Volunteer organization
- Members interact with the organization through the website and offline
- Assume that all members have accounts on the website
- Regular events (volunteer days)





REDHEN



## RedHen - What's In The Box

- Multiple modules to provide CRM functionality
- Custom entity types and fields
- Views and Rules integration
- Built on top of existing modules - e.g. Relation, Entity API
- RedHen specific theme - Poultry



## RedHen - Core Concepts

Contact	A person - the core entity
Organization	A grouping of contacts - e.g. company, family
Relationships	Connects contact with organizations or contacts
Note	Records touch points
Engagement	Scored types of activity
Membership	Connected to roles to allow time-based access.





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# CRM Dashboard

RedHen CRM is an open source CRM *framework* built natively in [Drupal](#). RedHen CRM is packed with [association management](#) (AMS) features for managing detailed information on contacts and organizations, membership services, event registrations, and constituent engagement.

## Contacts

View, manage, and search contacts.

## Organizations

View, manage, and search organizations.

## Activity

RedHen activity stream.

## Structure

Define bundles and manage fields for RedHen entities.

## Settings

RedHen configuration and settings.





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## RedHen - Relationships (Connections)

- Contact can be associated with other contacts or organizations
- Contact to organization is one-to-many
- Helps you keep track of who knows who





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## RedHen - Linking Contacts and Users

- Existing users automatically linked by matching emails
- Users created after a contact is created are linked manually







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## RedHen - Engagement Scores

- Arbitrary value assigned to some interaction
- Can be entered manually
- Can be triggered by some event on the website





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## RedHen - Engagement Scores

- Capturing engagement scores for site activity
- Logged in users are simple
- Anonymous users take a bit more work





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HEY LOOK! IT'S JUST DRUPAL.



# Customization

- Reporting
- Targeting and personalization





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# EVENTS AND REGISTRATION



## Events and Registration

- Registrations integrated into contacts
- Engagements for registrations can be scored like other events





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MAILCHIMP

# Mailing Lists and Subscriptions

- Managed from each user's account
- Sign-up can be placed on new account screen
- Subscriptions are automatically synced to MailChimp
- Anonymous user subscriptions



# Dashboard

Drafts ▾ [+ Create Campaign](#) ▾



## Create a list

Lists are where you store your contacts.  
[Show me](#)



## Create a campaign

Get started and create a campaign  
[Show me](#)

### A Quick Primer

[Lists](#) are where you store your contacts. People subscribe via [signup forms](#), or you can [import contacts](#) yourself. [Campaigns](#) are emails sent to your list.

### Need help with your first campaign?

[Read our getting started guide](#)

### Need some inspiration?

[Look what you can do with MailChimp](#)



# Campaigns

- Email templates managed in MailChimp
- Content from Drupal
- Campaigns managed from Drupal



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RESOURCES

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- ThinkShout - <http://thinkshout.com>
- Open Outreach - <http://openoutreach.org>
- Groups page - <https://groups.drupal.org/redhen-crm>







THANK YOU