

Customer/Constituent Management With RedHen and Mailchimp DrupalCorn 2013



INTRODUCTION



Introduction



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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 - 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

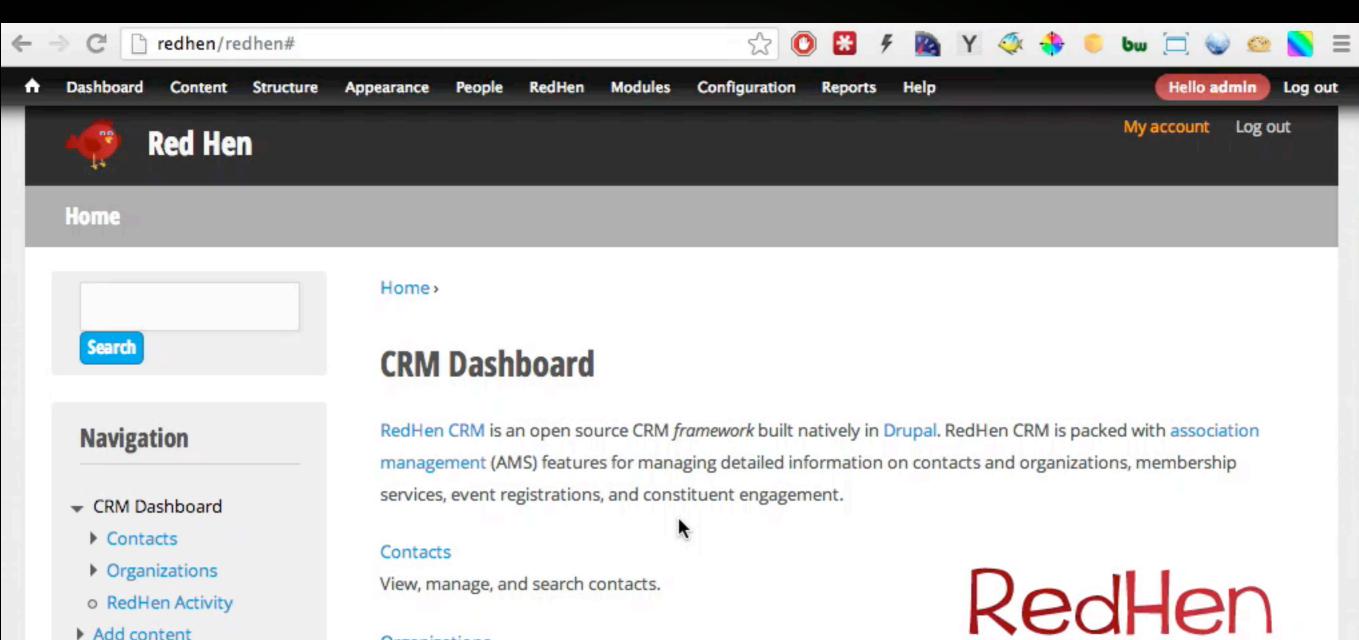




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RedHen - Core Concepts

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.	drupal com'13



CRM

- o RedHen Activity
- Add content

View, manage, and search contacts.

Organizations

View, manage, and search organizations.

Activity

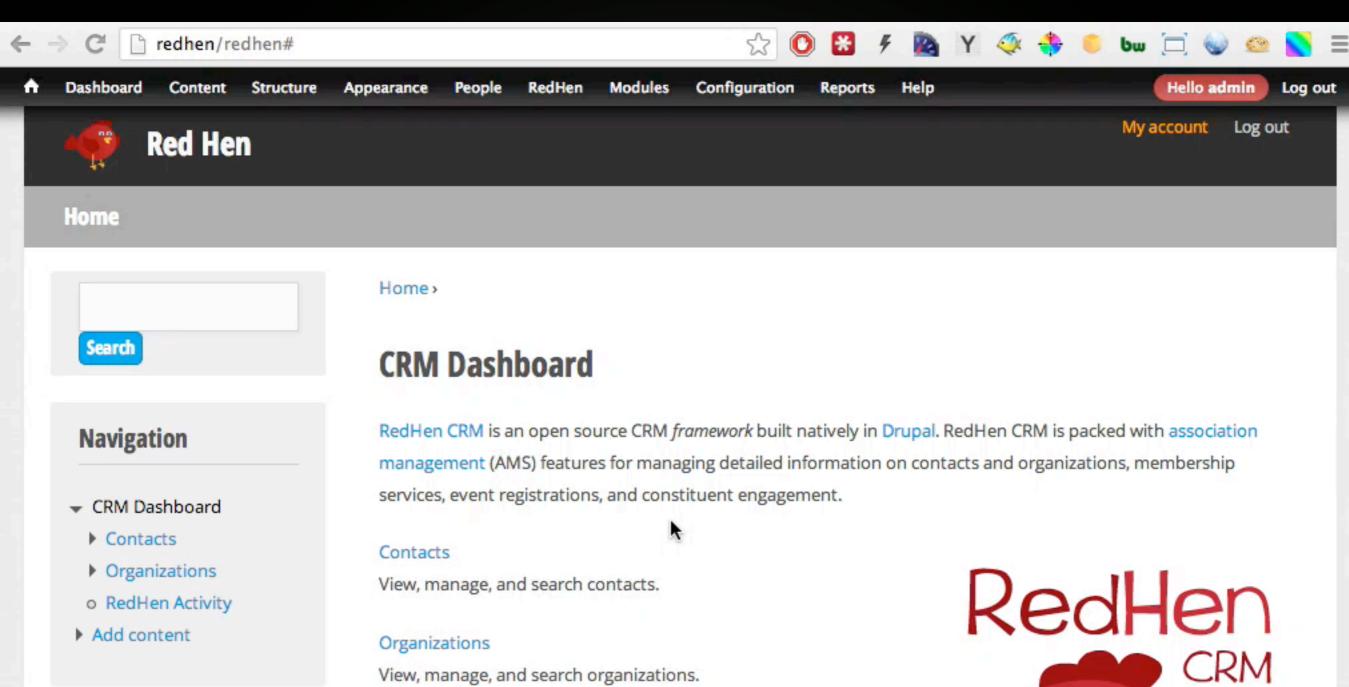
RedHen activity stream.

Structure

Define bundles and manage fields for RedHen entities.

Settings

RedHen configuration and settings.



Activity

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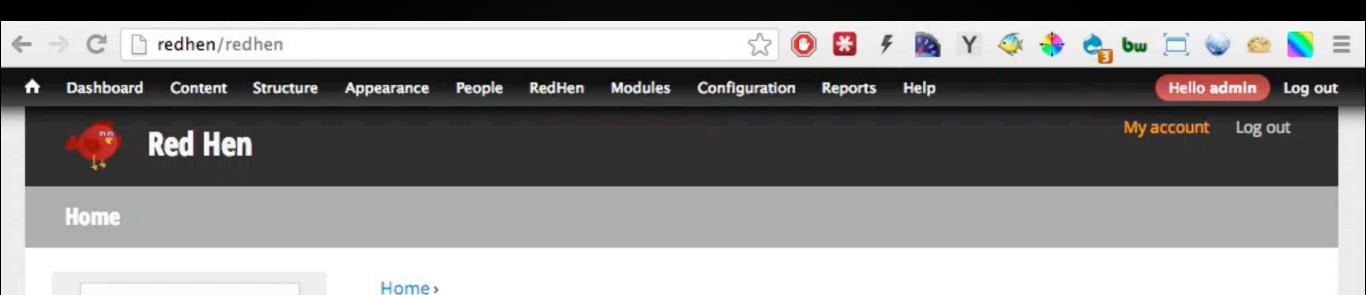
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RedHen CRM



Search

CRM Dashboard

Navigation

- CRM Dashboard
 - Contacts
 - Organizations
 - o RedHen Activity
- Add content

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

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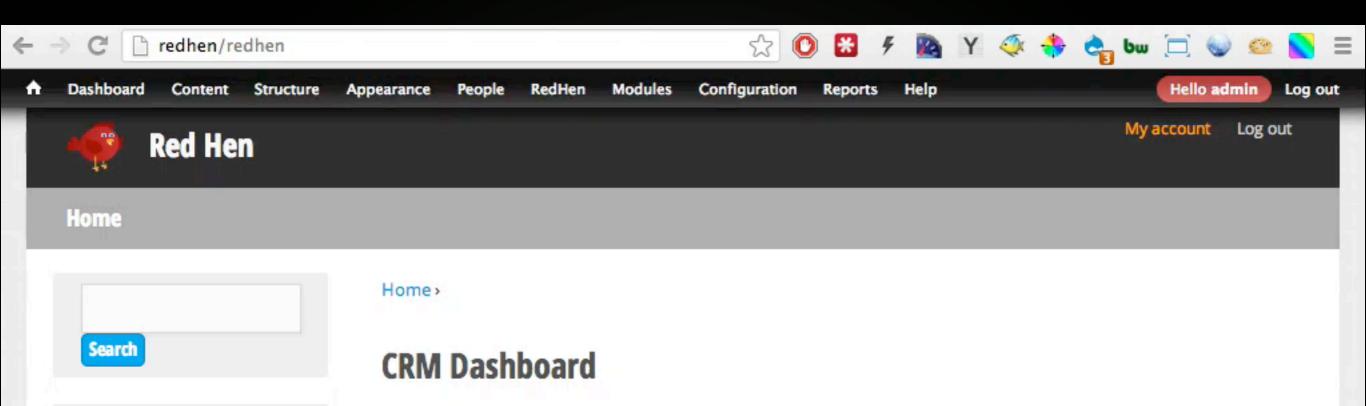
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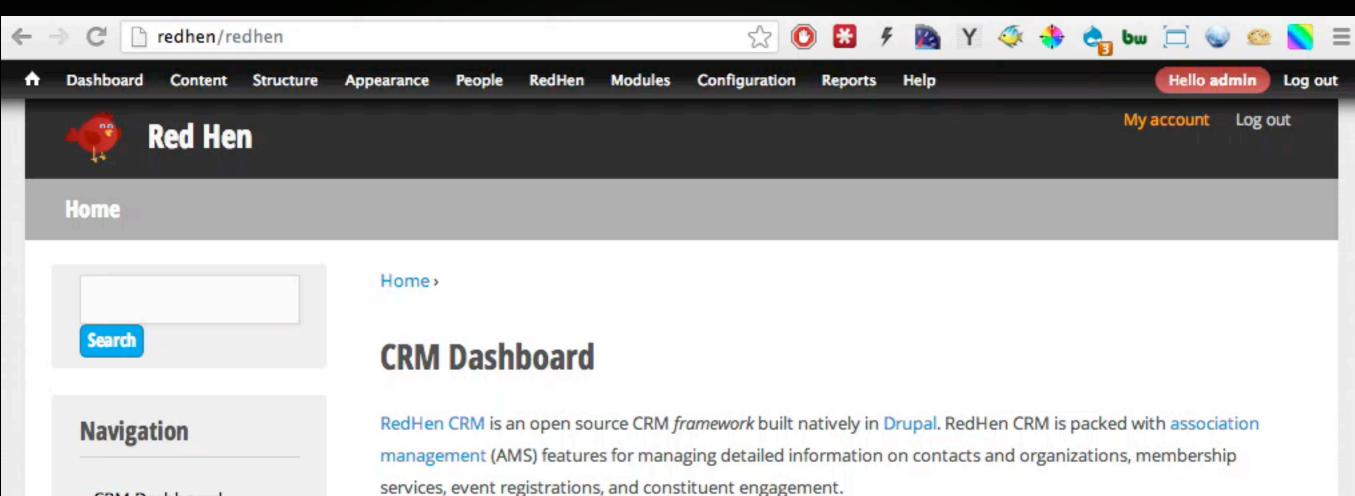
RedHen



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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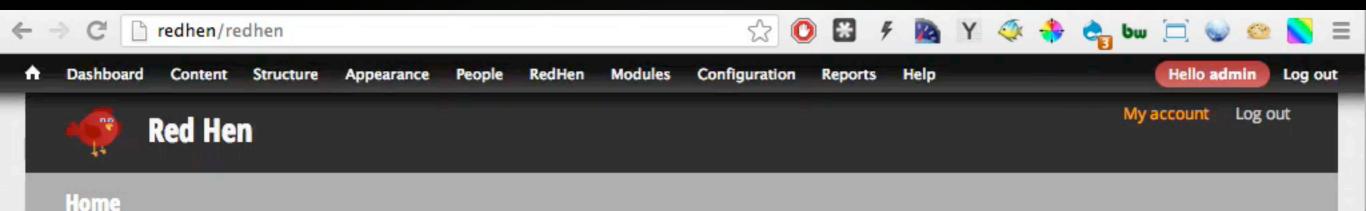
RedHen CRM



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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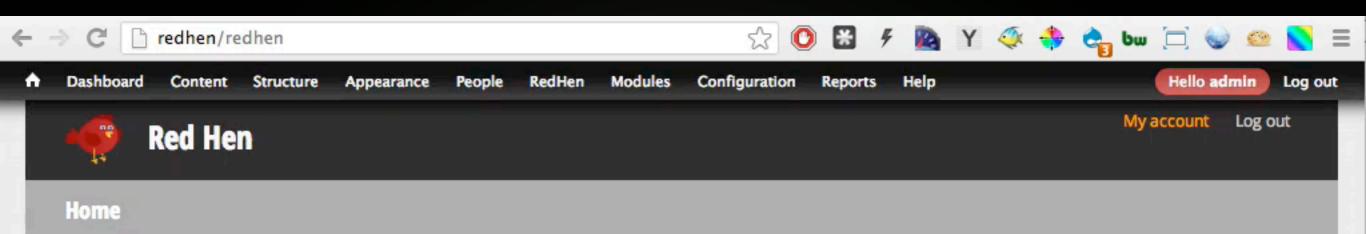




RedHen - Engagement Scores

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





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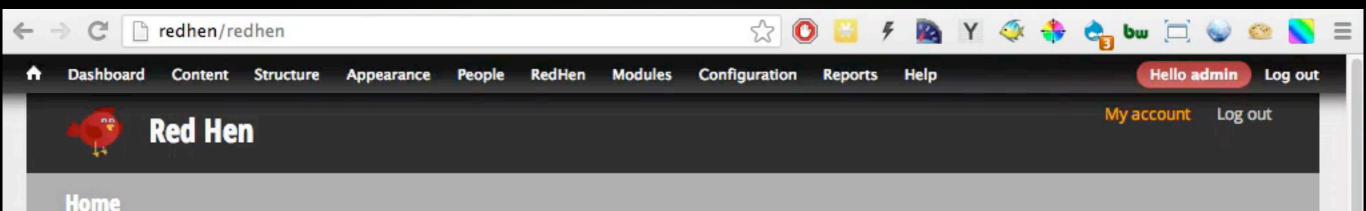




RedHen - Engagement Scores

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





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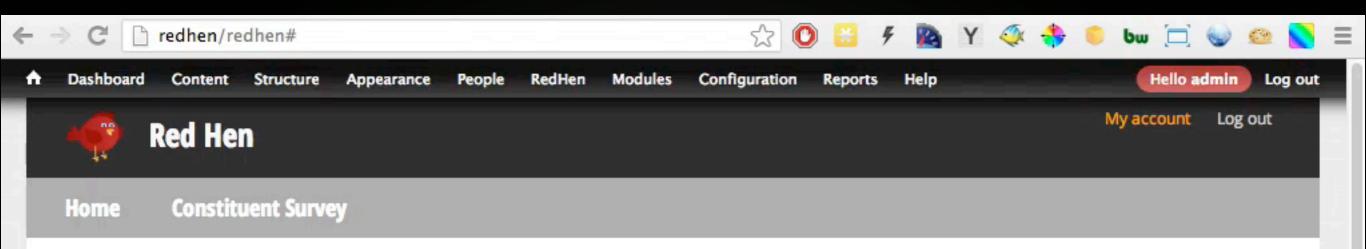
HEY LOOK! IT'S JUST DRUPAL.



Customization

- Reporting
- Targeting and personalization





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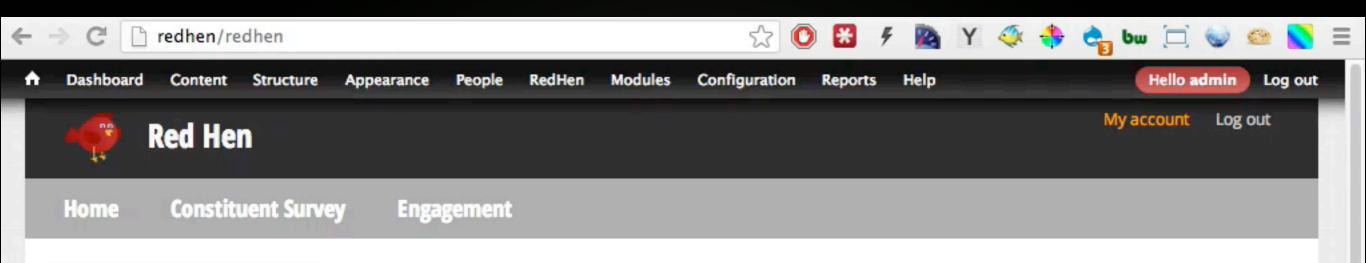
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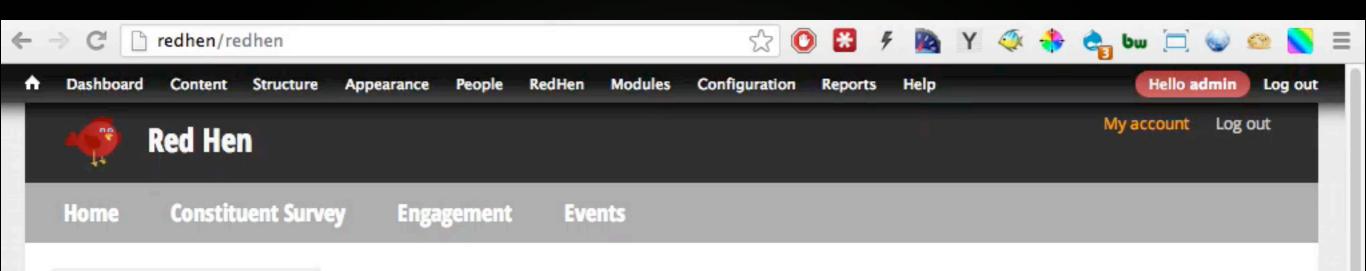
EVENTS AND REGISTRATION



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



MailChimp

Dashboard

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Create a list

Lists are where you store your contacts.

Show me



Create a campaign

Get started and create a campaign Show me Drafts 🔻 🕂 Create Campaign

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Karl

A Quick Primer

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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



MailChimp

Dashboard

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Need help with your first campaign? Read our getting started guide

Need some inspiration? Look what you can do with MailChimp



RESOURCES



Resources

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





THANK YOU