

Using email marketing on the CRM

Using the Healthwatch CiviCRM

About this resource

The CiviCRM allows you to create, send and track email marketing all from one place. By using the mailing function within your CRM, you're able to easily keep track of who has been sent what and whether they have opened it or taken any action.

This resource talks you through the process of creating and scheduling a mailing, and evaluating its results.

Creating a mailing

Setting up your mailing

To improve the way that CiviCRM produces bulk mailings, we have developed a user-friendly drag-and-drop system based on the Mosaico mailing system.

Before you start, you will still need to have your mailing lists ready to use in groups.

You can easily build a new template now or create a different one each time you send a mailing if you wish to.

Go to 'New Mailing' in the Mailings section of the menu. You will then see the following screen.

The screenshot shows the 'New Mailing' form in CiviCRM. At the top, there are three tabs: '1 Mailing', '2 Design', and '3 Options'. The 'Mailing' tab is active. The form contains the following fields:

- Mailing Name ***: A text input field containing 'Volunteering newsletter'.
- From ***: A dropdown menu showing '"TestFromEmail" <test@test.co.uk>'.
- Reply-To**: A dropdown menu showing '"TestFromEmail" <test@test.co.uk>' with a close button (x) and a dropdown arrow.
- Recipients ***: A dropdown menu showing 'Opticians' with a plus icon and a dropdown arrow. To the right of this field, it says 'No recipients'.
- Subject ***: A text input field containing 'Dear {contact.email_greeting}, can you help us by volunteeri'. To the right of this field is a 'Tokens' dropdown menu.

At the bottom of the form, there are three buttons: 'DELETE DRAFT' (in a red box), 'SAVE DRAFT' (in a grey box), and 'CONTINUE' (in a blue box).

The Mailing Name is an internal reference to what you want to call your mailing in your CRM, not the one that will go out to your recipients.

You can have several different email addresses that you send mailings from, and then just choose the one that you want to send out this time.

You can then choose a Reply-To email address, where you would like any responses to be sent to.

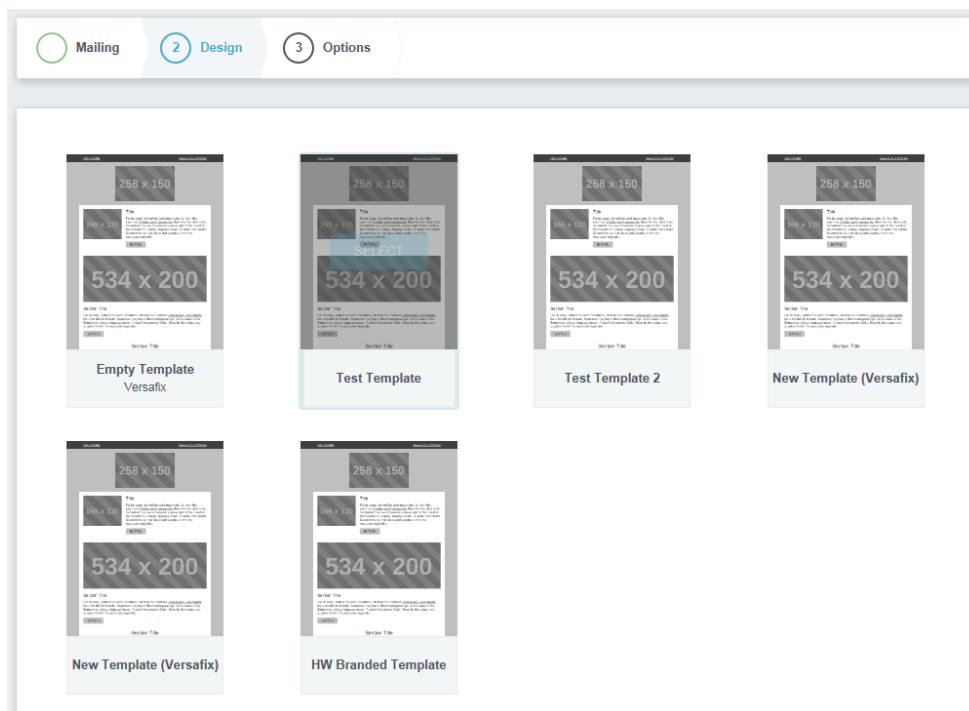
The recipients can either be groups or be past recipients of emails. For example, you can send the November newsletter to all of the October newsletter's recipients.

The Subject can contain 'Tokens': these are CiviCRM's method of personalising emails. For example, if we put the token {contact.email_greeting} in the subject line, each email will be sent with the personalised touch, i.e. the person's name will be inserted into the subject line.

Once you have completed all of the fields, click through to the next page, or save your draft.

Designing your mailing

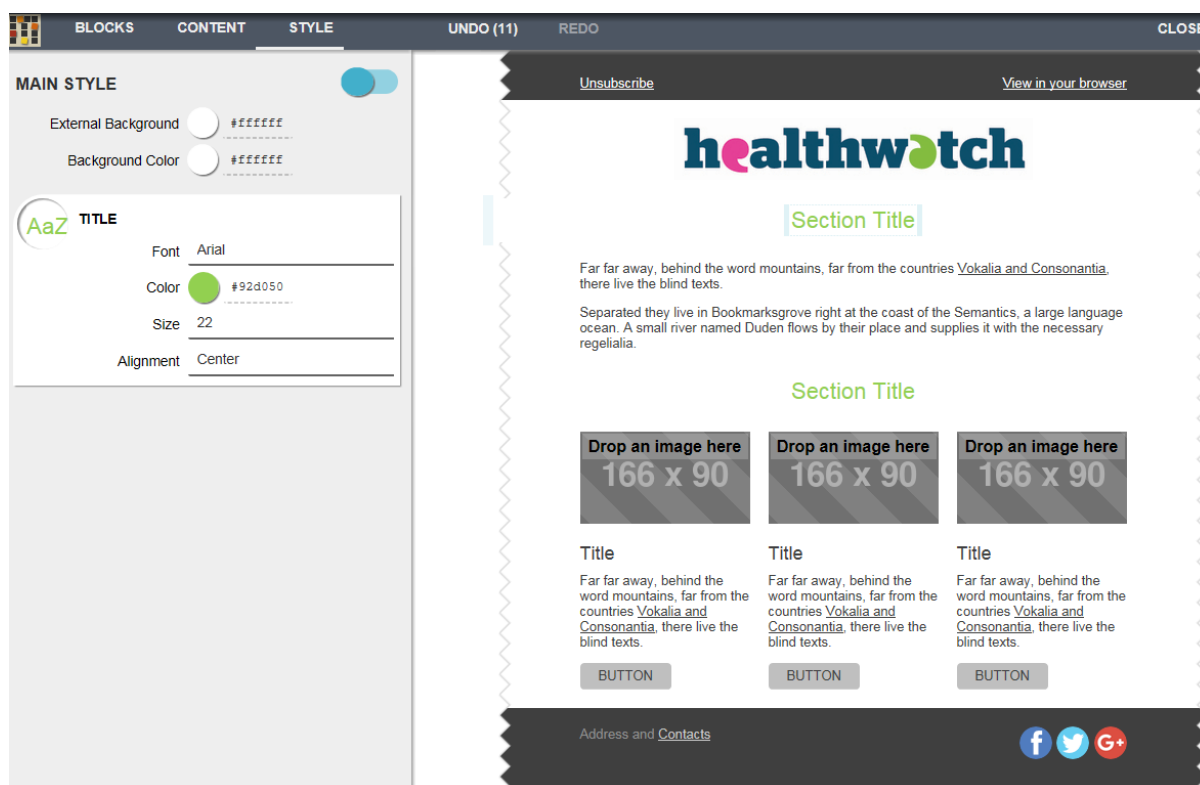
You can choose to start from scratch (Empty Template) or choose an example from the ones that you have created before and saved.



In this example, we're using the 'Empty Template'. A new page will appear, and it is here that you can customise your mailing:



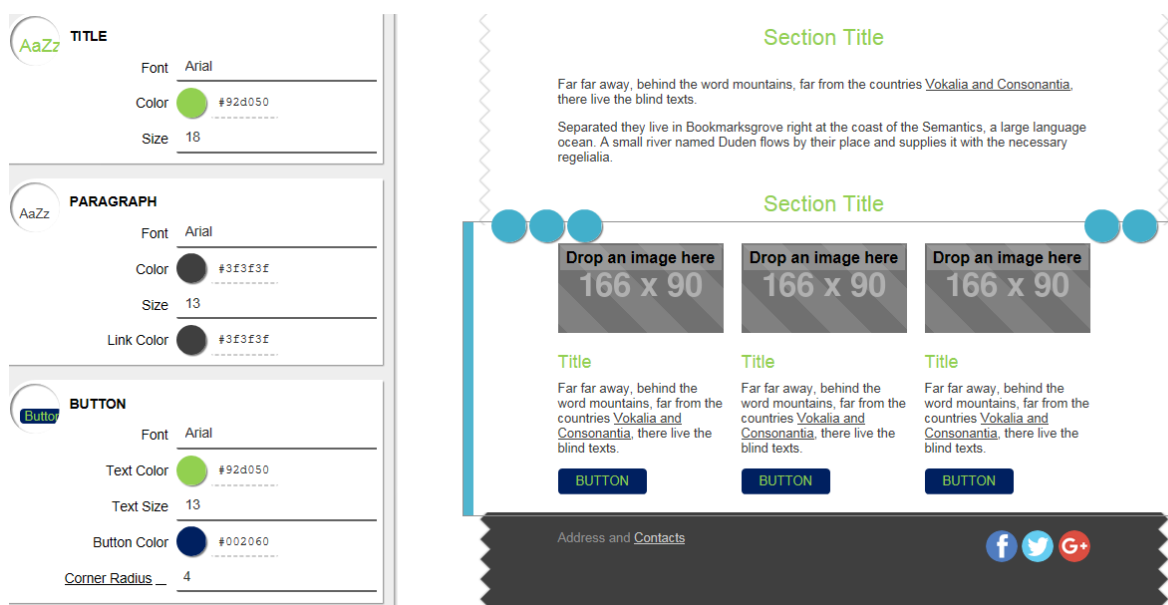
There is a long list of different blocks for you to choose from, and you can drag and drop them to build them up one under the other.



You can then upload images and change the text as you wish.

To change the colours of certain blocks you simply click on the block, then go into the 'Style' section and you will be able to change not only colour but also font, size and alignment. Please use the brand guidelines to ensure that you're using the correct colours

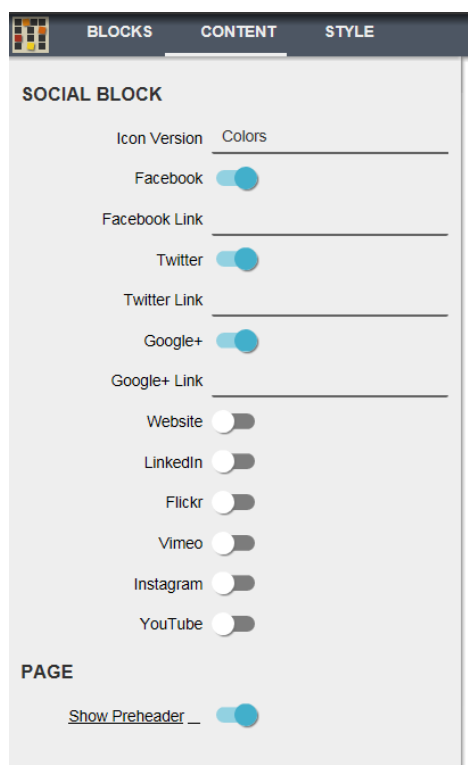
Here you can also change the colours of buttons and other parts of the block:



You can also see that there is a section called 'Content', and here you are able to add links to any icons or websites that you have in your block. For example, if we look at the social media block at the bottom, we can see that it has icons for Facebook, Twitter, and Google+:



By going into the Content section, you can then add extra social media buttons, such as LinkedIn, and then put in the links to your social media accounts.



BLOCKS **CONTENT** **STYLE**

SOCIAL BLOCK

Icon Version Colors

Facebook ☒

Facebook Link

Twitter ☒

Twitter Link

Google+ ☒

Google+ Link

Website ☐

LinkedIn ☐

Flickr ☐

Vimeo ☐

Instagram ☐

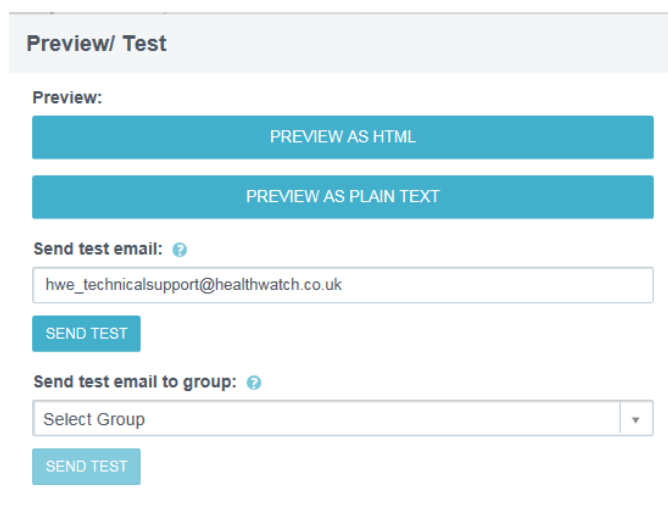
YouTube ☐

PAGE

Show Preheader ☒

When you are writing the content, you can add tokens in the same way that you did in the Subject line: there is a long list of tokens to choose from and you simply click on one and it adds it to your mailing. Tokens have already been built into the blocks for 'View in browser' and 'Unsubscribe' so you no longer have to enter them yourself.

When you are ready, it is a good idea to test your mailing before sending it to your mailing list: this is usually done by either sending it to colleagues or just to yourself. You will see that in the top right-hand corner of the screen there is a button marked 'TEST': click on that and the following box will appear:



Preview/ Test

Preview:

PREVIEW AS HTML

PREVIEW AS PLAIN TEXT

Send test email: ?

hwe_technicalsupport@healthwatch.co.uk

SEND TEST

Send test email to group: ?

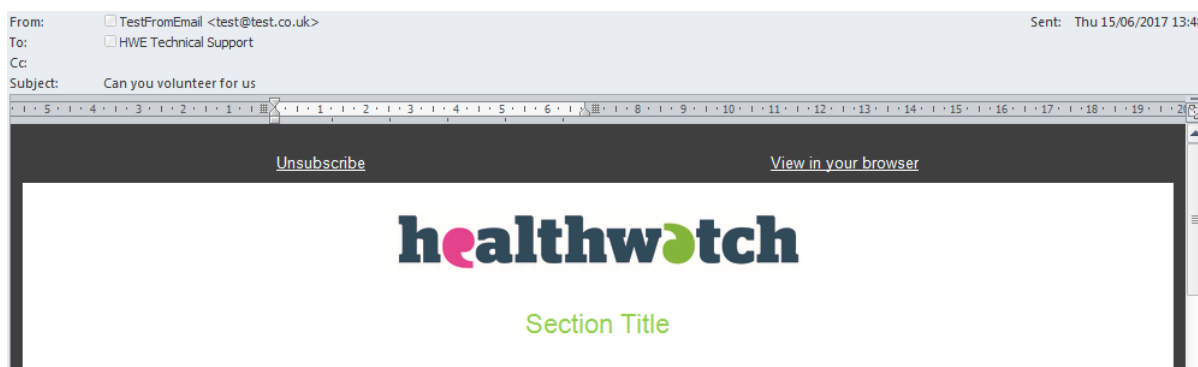
Select Group

SEND TEST

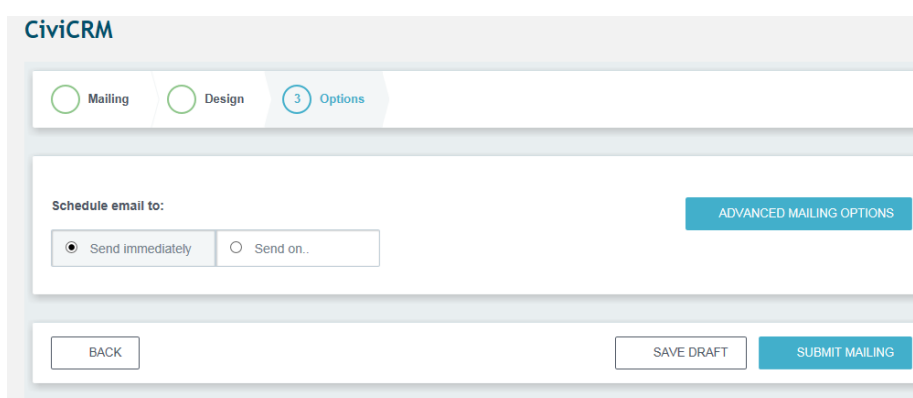
Here you can preview your email and then, if you are happy with it, you can send a test mailing to yourself or someone else.

Make sure you test functions such as 'View in browser', 'Unsubscribe' and check that the links are correct.

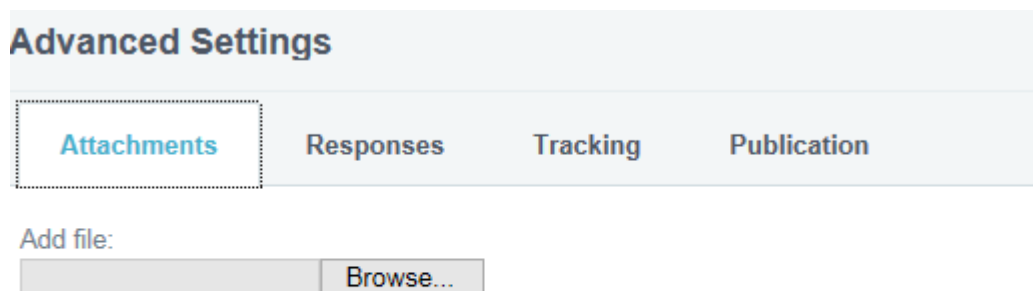
The email comes through appearing to be from whichever email address you selected at the beginning of the process.



When you have customised your mailing and tested it, then you can click through to the next page, and you can see the following options:



You can either send the mailing immediately, or instead schedule it on a specific date. You can also choose from some advanced options.



Alternatively, you may add new files using drag/drop.

You can add attachments to the mailing in the section called Attachments, and decide whether you want to track the click throughs to any websites (or your social media pages) that you have included in the Tracking section.

Please note - it is not best practice to attach documents to mailings going to a large group of people. This might get marked as spam. It is better to host the document on your website, and link through to the document from your email.

In Publication, it is helpful to have the setting to Public Pages otherwise your recipients will have difficulties viewing in browser.

Mailing reports

Mailing reports are a very useful feature of CiviCRM. They allow you to track who has opened your email, whether there have been any bounce backs, and give you other information such as which links in your mailing have been clicked on and how many times.

To get this, simply go to your Scheduled and Sent Mailings tab, and then at the end of the line with your mailing on it you will see 'Report':

Stakeholder group - all CRM users	Complete	Novick	10th June, 2016 11:05 AM	Novick	10th June, 2016 11:24 AM	10th June, 2016 11:25 AM	10th June, 2016 11:26 AM	Report Re-Use more ▶
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Click on 'Report' and your Mailing Summary Report will appear

Delivery Summary		
Intended Recipients	81	Report Advanced Search
Successful Deliveries	79 (97.53%)	Report Advanced Search
Tracked Opens	16	Report Advanced Search
Click-throughs	0	Report Advanced Search
Forwards	0	Report Advanced Search
Replies	0	Report Advanced Search
Bounces	2 (2.47%)	Report Advanced Search
Unsubscribe Requests	0 (0.00%)	Report Advanced Search
Opt-out Requests	0 (0.00%)	Report Advanced Search
Scheduled Date	10th June, 2016 11:24 AM	
Status	Complete	
Start Date	10th June, 2016 11:25 AM	
End Date	10th June, 2016 11:26 AM	

Here you can see that 79 out of the 81 intended recipients received the email, while 2 bounced and 16 opened. You can then break that down into further detail by clicking on the 'Report' link on the same line.

There are other mailing reports and these can be found under 'Mailing Reports'. You can also create your own in the same way that you would create any report.