

Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

Welcome to Bloomerang Academy

Thank you for joining us!

A smaller portion of a Monstera leaf, located in the bottom right corner of the slide.

+1 669 900 6833

Join the Online Audio or Dial in!



Housekeeping

Live Transcript

We all know what we want to do is spend
administration and more time Doing the w

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Chat



Raise Hand



Q&A



Live Transcript

Share ideas

Ask questions

Housekeeping

The resources mentioned in the session will be linked on the Resources slide at the end of this presentation.

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to support@bloomerang.com. Our support team is amazing!

Exploring Bloomerang Automations



 **zapier**

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Agenda

1. Automation opportunities
2. Approach to automations
3. Common use cases
4. Continuous improvement



Why integrations matter

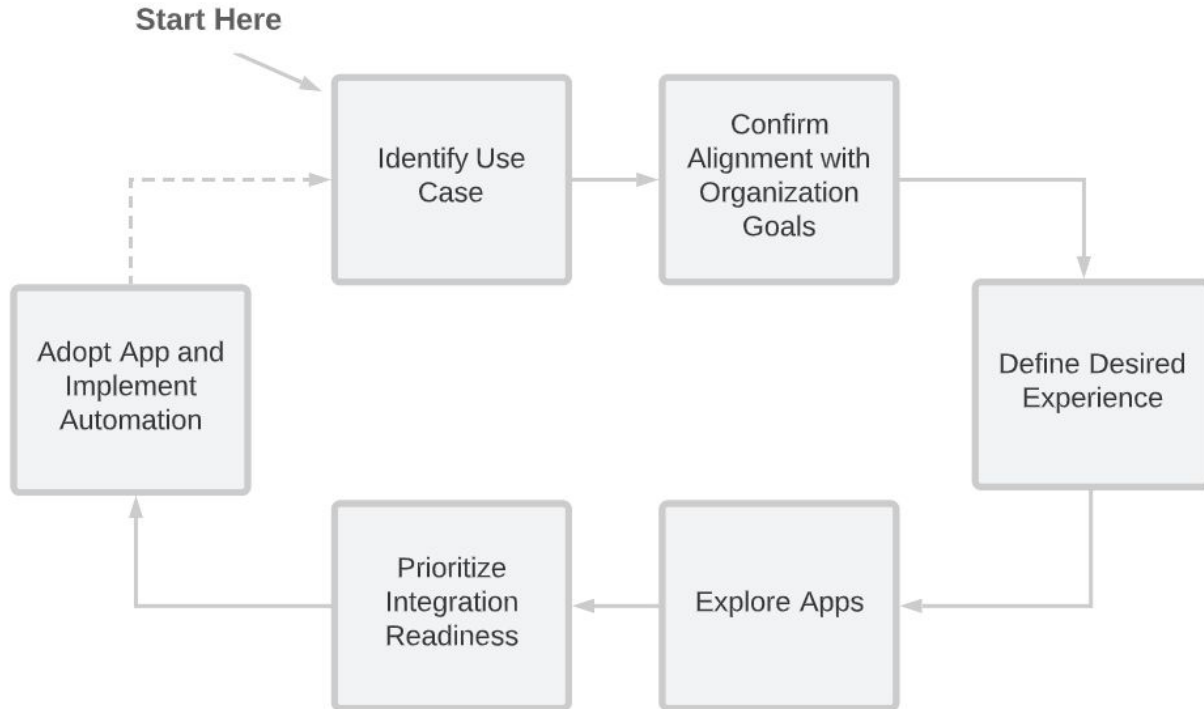
You use other tools

- CRM
- Email marketing
- Email coordination
- Online giving
- Major gift pipeline
- Volunteers
- Accounting
- Email and calendars
- Tasks and to-dos
- Peer to peer
- Reporting and analytics
- ... plus others

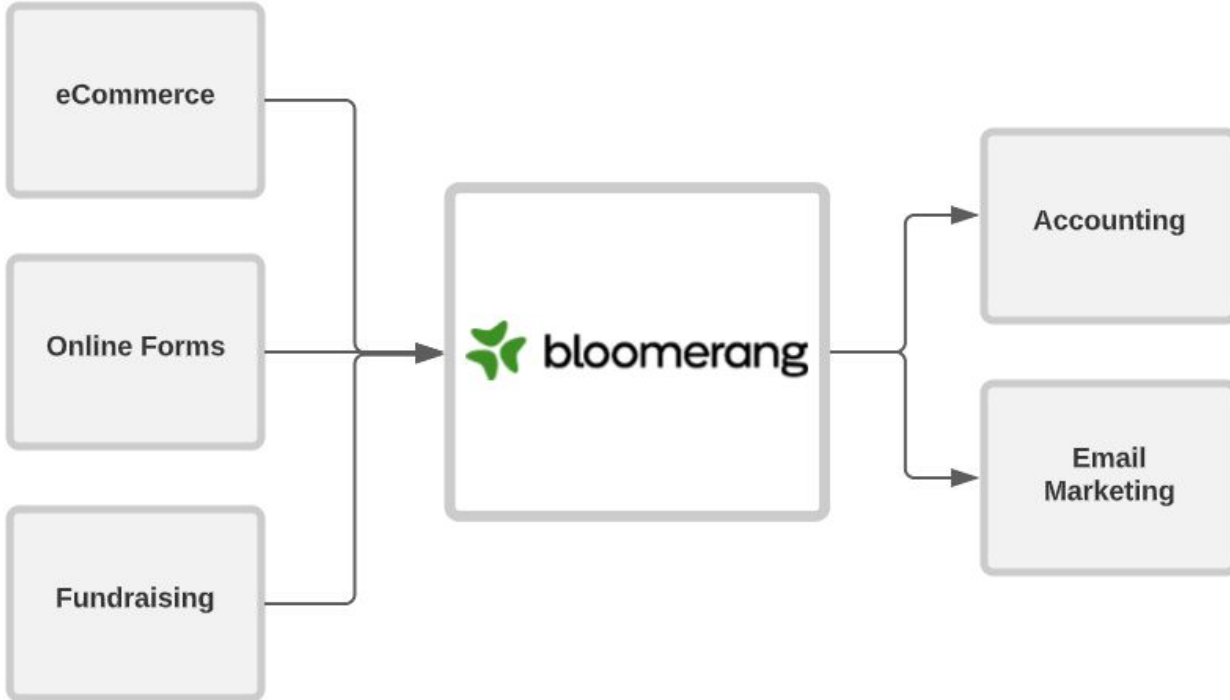
Opportunities for automation

- Eliminate double data entry
- Strengthen reporting and improve data quality
- Expand capability without more human capital/resource

Adoption of new apps

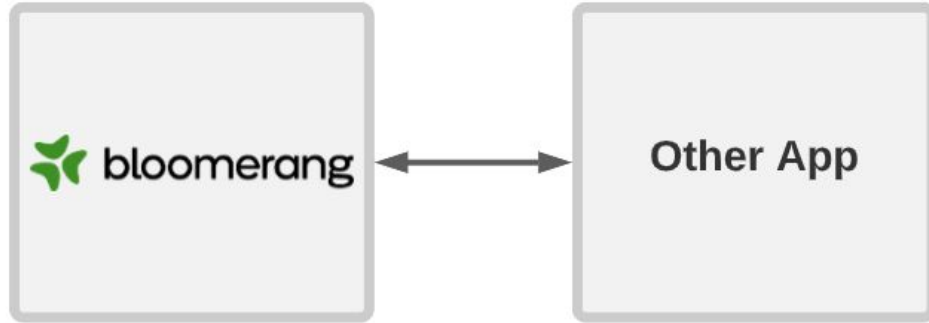


CRM is central hub



Types of integrations

Native vs. Zapier



Reasons we're excited

1. 6,000+ integrations in one place
2. Anyone can build automations in Zapier
3. Custom integrations that fit your workflow

**Do you currently have any
native or Zapier integrations?**

Email marketing



Email marketing

From Bloomerang

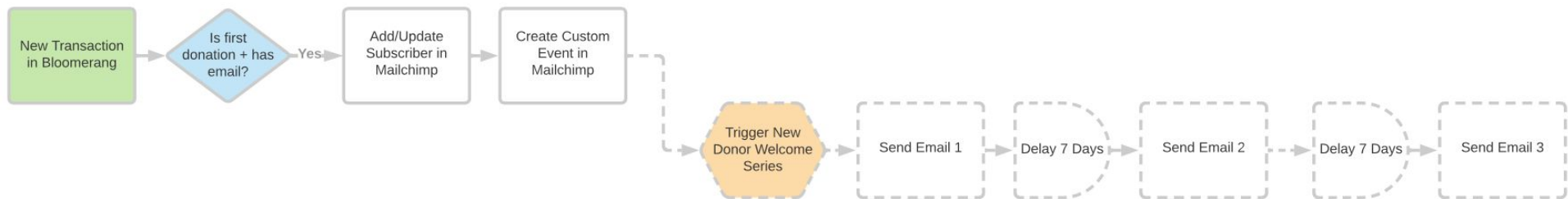
- Accounts with email-only to Mailchimp audience
- Accounts to Mailchimp with groups, tags, merge fields
- Accounts to Mailchimp with specific criteria for enrollment in automated campaigns



Email marketing

Automated email campaigns

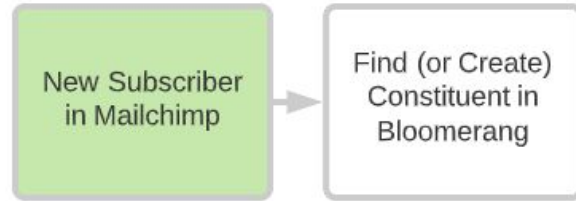
- New donor drip campaign
- Birthday notifications
- Annual lapsed donor reminders
- Follow-ups on membership renewal dates



Email marketing

To Bloomerang

- New subscribes to create constituent accounts
- Log unsubsribes as activities/notes
- Log preference changes as updates to constituent accounts

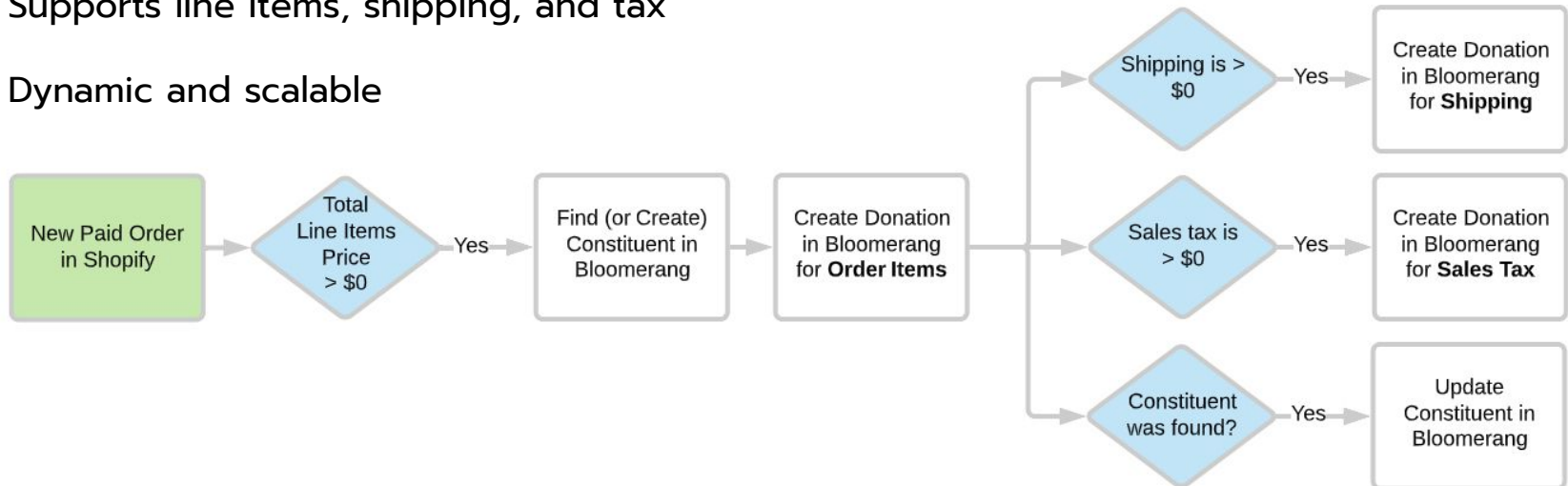


eCommerce



eCommerce

- Paid orders
- One transaction per order or line item
- Supports line items, shipping, and tax
- Dynamic and scalable

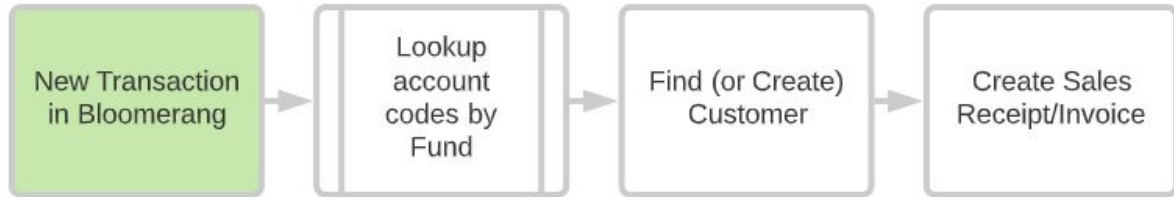


Accounting



Accounting

- Find (or create) customer
- Create a draft (undeposited) sales receipt/invoice
- Dynamic coding
- Real-time sync



Bloomerang to Bloomerang



Bloomerang to Bloomerang

- Key constitute attributes following an online donation
- Membership management
- Transaction custom field update
- Stewardship tasks

Large, vibrant green Monstera leaves with characteristic holes, positioned in the top-left and bottom-left corners of the slide.

Dynamic reporting dashboards

A faint, semi-transparent preview of a dashboard interface is visible in the bottom-right area of the slide, showing various data visualization components like charts and tables.

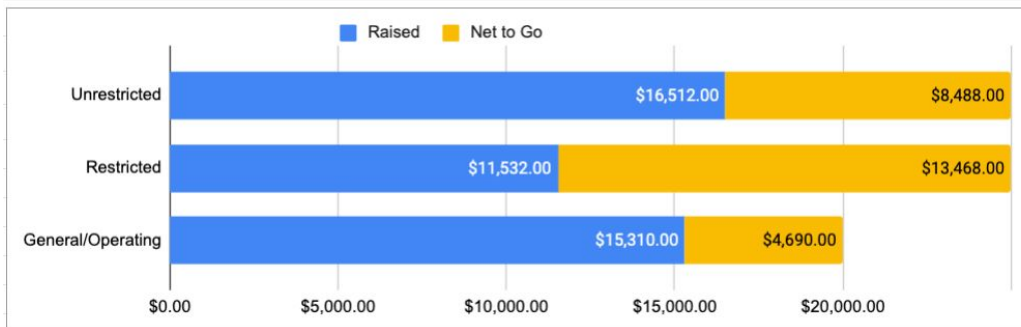
Dynamic reporting dashboards

Reasons for dashboards

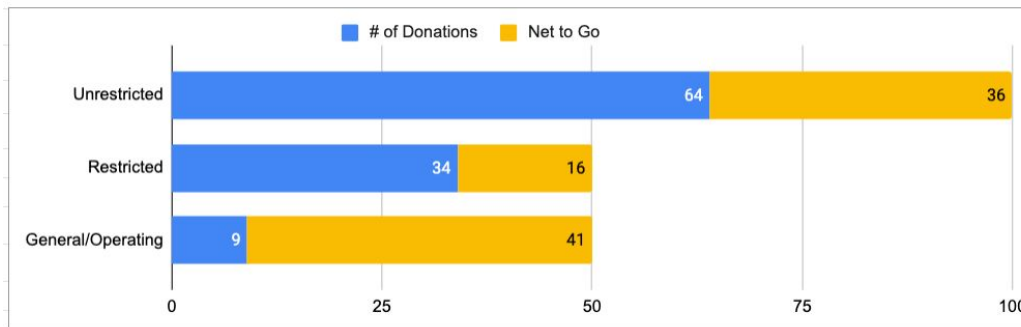
- Non-Bloomerang users need access to data
- Need up to date lists in real-time
- More efficient to have a real-time list
- Need advanced reporting beyond Bloomerang capabilities

Dynamic reporting dashboards

Fund Activity



Fund	Raised	Net to Go	Goal	% Toward Goal
Unrestricted	\$16,512.00	\$8,488.00	\$25,000.00	66.05%
Restricted	\$11,532.00	\$13,468.00	\$25,000.00	46.13%
General/Operating	\$15,310.00	\$4,690.00	\$20,000.00	76.55%



Fund	# of Donations	Net to Go	Goal	% Toward Goal
Unrestricted	64	36	100	64.00%
Restricted	34	16	50	68.00%
General/Operating	9	41	50	18.00%

Dynamic reporting dashboards

Major Gift Pipeline

Stage	This FY	Next FY	2 FYs	3+ FYs	Total	
ID/Qualify	\$0.00	\$175,000.00		\$0.00	\$0.00	\$325,000.00
Cultivate	\$0.00	\$5,000,000.00		\$0.00	\$0.00	\$10,000,000.00
Proposal/Ask	\$0.00	\$40,000.00		\$0.00	\$0.00	\$40,000.00
Closed - Won	\$0.00	\$100,000.00		\$0.00	\$0.00	\$100,000.00
Closed - Lost	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00
	\$0.00	\$5,315,000.00		\$0.00	\$0.00	\$10,465,000.00
Solicitor						
Jeff Haguewood	\$10,400,000.00					
Jessie Gilchrist	\$40,000.00					
Ally Seidel	\$25,000.00					
	\$10,465,000.00					
Gift Type						
				Cash	\$10,365,000.00	
				Pledge	\$100,000.00	
				Property	\$0.00	
					\$10,465,000.00	
Constituent Type						
Business-Corporation	\$10,000,000.00					
Community Foundation	\$0.00					
Individual	\$365,000.00					
Non-Profit	\$0.00					
Organization	\$100,000.00					
Private Foundation	\$0.00					
University-School	\$0.00					
	\$10,465,000.00					
Opportunity Focus						
				Capital	\$10,000,000.00	
				General	\$340,000.00	
				Programs	\$125,000.00	
					\$10,465,000.00	

Dynamic reporting dashboards

Task Management



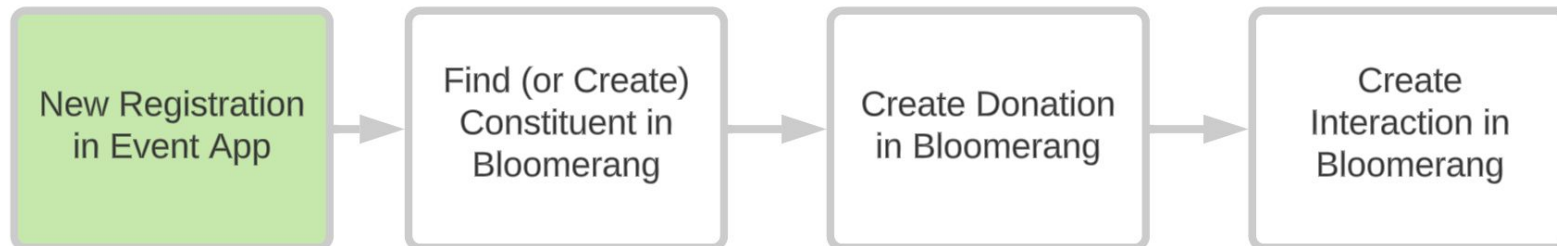
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Event Registration

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Event Registration

- Find (or create) a constituent
- Create a donation for registration fee (optional)
- Create interaction for event participation
- Real-time sync

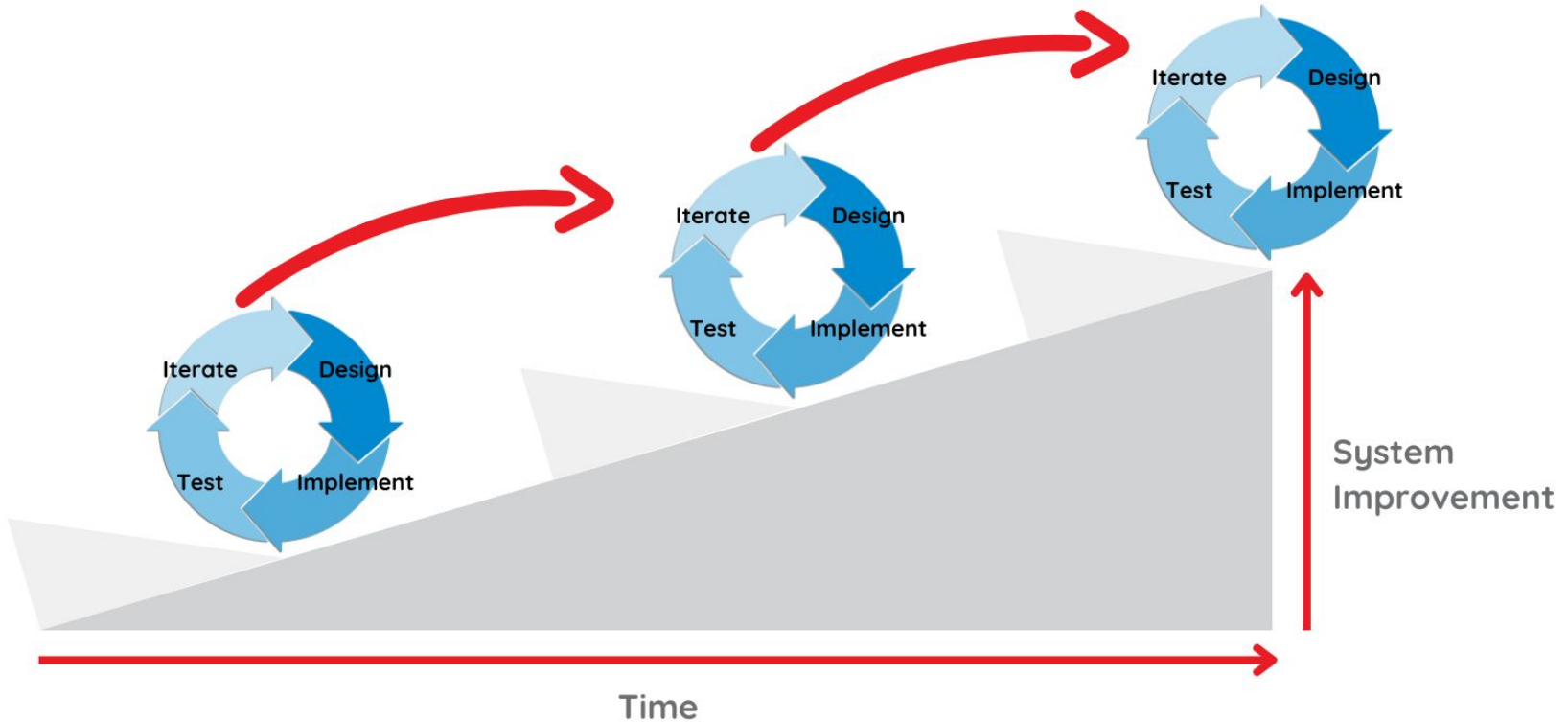


Other solutions

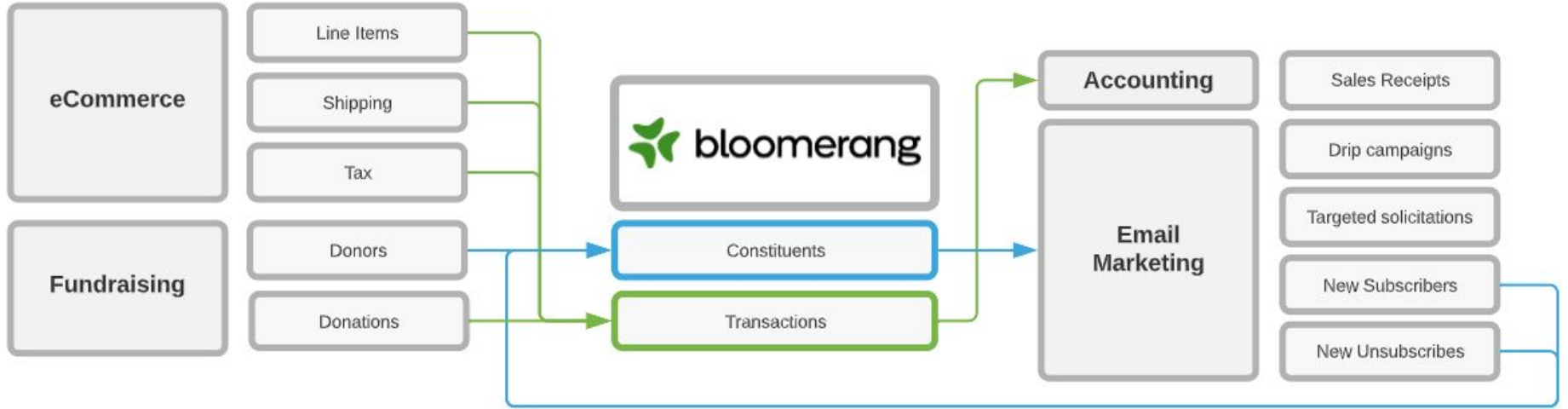
- Searchable member directory with AirTable
- Video acknowledgements (e.g., Bonjoro)
- Online data collection forms
- Major gift pipeline management

Automation lifecycle

Continuous improvement



CRM is central hub



**Would you like a follow-up
about consulting services?**



Zapier integration experts working exclusively with nonprofits and public sector agencies.

www.SidekickSolutionsLLC.com

info@sidekicksolutionsllc.com



Thank you