



5 MUST-HAVE WORKFLOWS

Session Handout

WHY WORKFLOWS?

- Based on simple 'triggers' and 'actions,' you can automate first-time visitor follow-up, get notified if people stop attending, assign specific individuals to follow up member needs, follow up with donors, and so much more!
- Workflows automate ministry processes to save administrative time and better engage your members. Automate the important!

WORKFLOW PARTS

- A **Trigger** is an alert that is activated when a specific event takes place in your ChMS database.
- **Actions** happen when the trigger is activated.

GIVING WORKFLOWS

- Thank A New Donor
- Engage A New Donor to a Particular Fund
- Engage A Donor Who Stopped Giving
- Thank Donors for Continuous Giving
- Thank Donors That Gave Over a Certain Amount

ATTENDANCE & FOLLOW-UP WORKFLOWS

- Automated Management of Members Not Attending
- Assimilate Visitors with Automated Follow-Ups
- Birthday & Anniversary Reminder Workflows
- Adding New Visitors from a Form Submission Workflow
- Building A Workflow For Background Check Reminders

EVENT & FORM WORKFLOWS

- Using Workflows with Event Registration
- Update Individual Profiles with a Form Submission Workflow

WORKFLOWS HELP

Click on this link for detailed instruction for all these workflow examples!

<https://documentation.learnchms.com/external/article/259?l=45>