

EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

MAILING LISTS WORKSHOP: BUILD & OPTIMIZE YOUR OUTREACH

PRESENTED BY

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OVERVIEW

- Purpose of Mailing Lists
- Use Cases for Mailing Lists
- Data Sources used for Mailing Lists (Contacts, Constituents, Donors)
- Walk-through/
Demonstration
- Build your own!

Mailing Lists

- Simpler, fewer clicks, easier to use
- Offers option to remove duplicates (by email or physical address)
- Manually add/remove Members at the time of mailing (not Dynamically)
- Can be composed of Donors (Formal Default,) Constituents, or Contacts (or a combination of the three)
- Intended for distributing letters (and eventually for emailing)

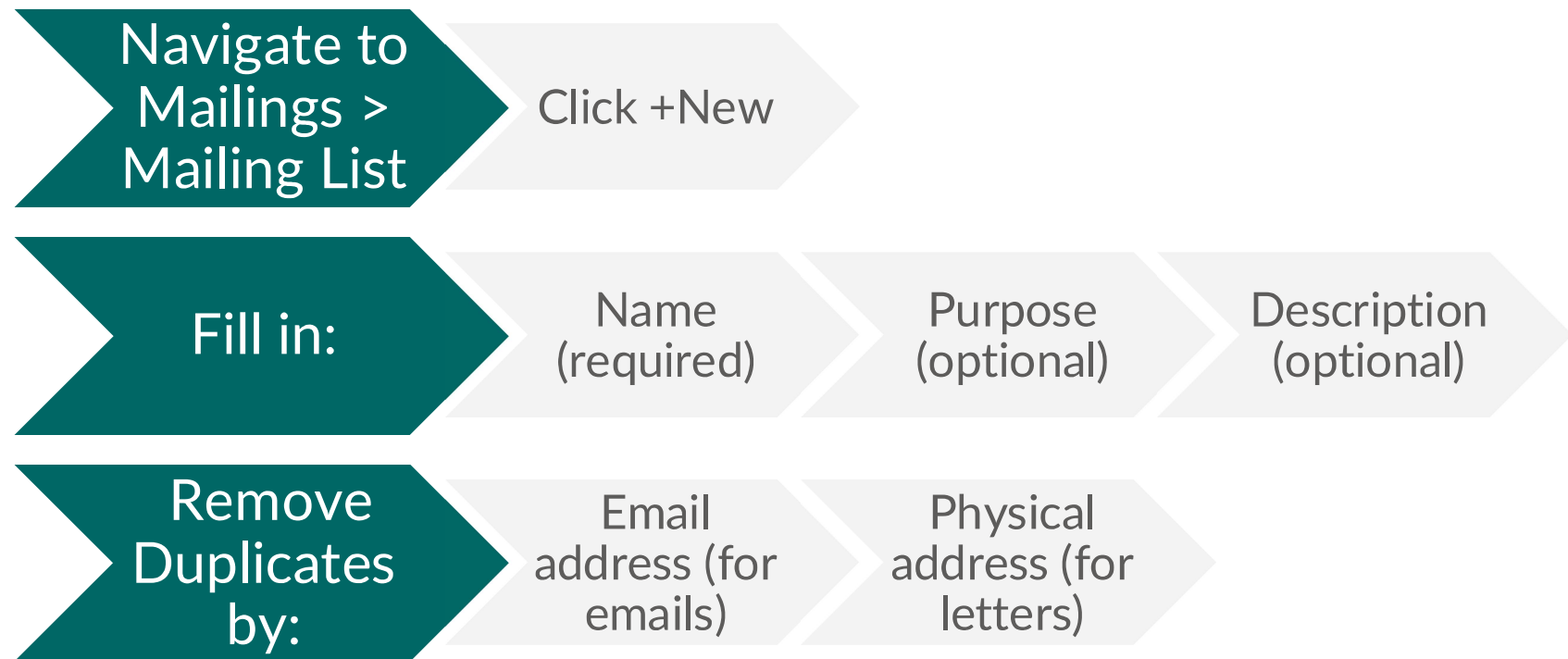
Way to communicate with a group of Contacts or Constituents

Can work together (form a Mailing List from the members of a Marketing List)

Marketing Lists

- More involved, more steps
- Need to manually remove duplicates
- Can dynamically pull in members (based off criteria that is always up to date)
- Must be targeted at Contacts OR Constituents
- Can be linked to a larger marketing effort (Campaign/Quick Campaign or Event)

CREATING A MAILING LIST



ADDING MEMBERS TO A MAILING LIST

From a View:

- Select records in Contacts, Constituents, or Donors
- Click +Add to Mailing List
- Choose list and submit

From a Record:

- Open individual record
- Click +Add to Mailing List

Note:

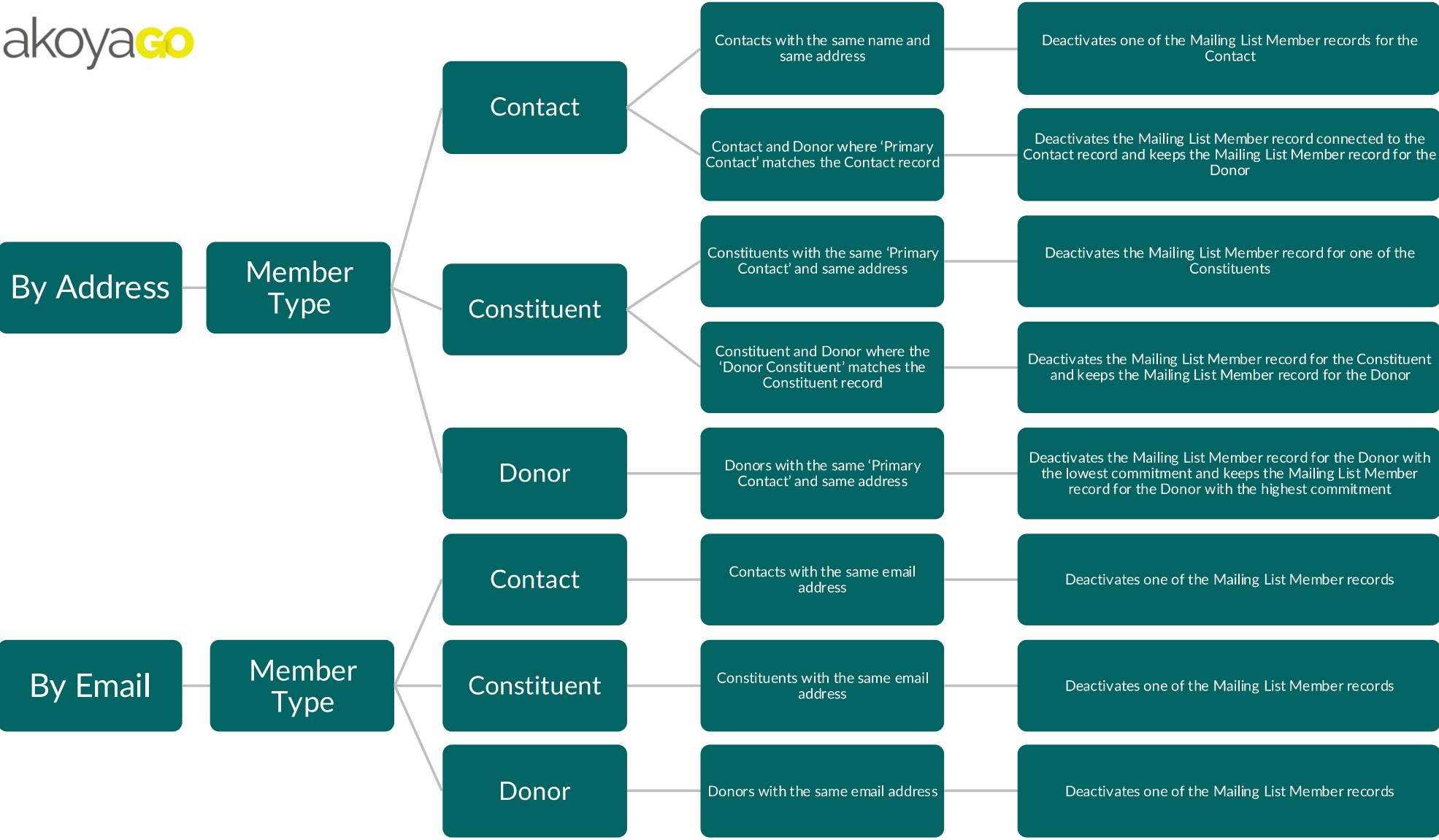
Only “Active” records can be added to mailing lists

MAILING LIST MEMBER RECORDS

- Stored in Mailing List Members table
- Fields:
 - Mostly locked except Salutation
 - Populated from linked Contact/Constituent/Donor
 - Includes address, primary/secondary contacts, etc.

Note

Need to change an address? Update the Contact/Constituent/Donor record and then choose Update Addresses on the Mailing List.



THANK YOU

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