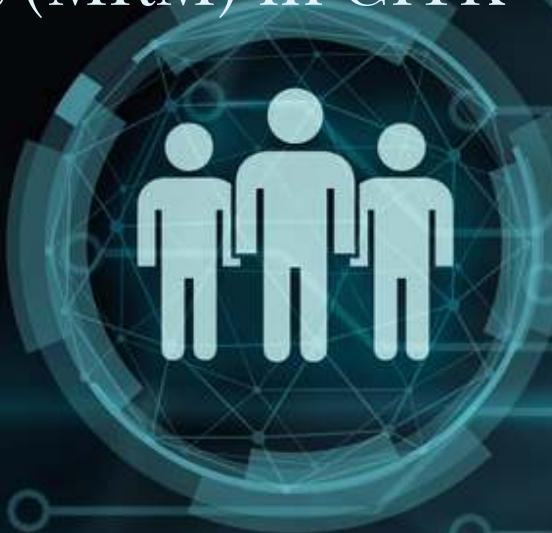# CITK

Implementing Member Relationship Management (MRM) in CITK

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Member Relationship Management (MRM) involves keeping track of church members, their involvement, and their needs. CITK CRM can be used to organize and manage your members effectively.

Step-by-Step Guide:

1. Setting Up Custom Fields

Create Custom Fields

1. Navigate to Settings: Go to Settings > Custom Fields.
2. Create Fields for Specific Member Data:

- Family Group
- Role
- Volunteer Interest
- Date Joined
- Membership Type
- Preferred Service Time
- Choose Type accordingly (e.g., text, date, dropdown).

Save and Organize the Fields:

Save

2. Organizing Contacts in the CRM

Create Tags for Member Segmentation

1. Navigate to Contacts: Go to Contacts.
2. Create Tags:

- Regular Attendee
- Volunteer
- First-time Visitor
- Youth Ministry
- Men's Group
- Click Save.

3. Adding/Importing Contacts to CITK

1. Add New Contact Manually: Go to Contacts > + Add Contact.
2. Fill out the member information (first name, last name, email, phone, etc.).
3. Assign tags and fill out custom fields as necessary.
4. Click Save.
5. Import Contacts from a CSV File: Click Import Contacts, upload a CSV file with member data, map the CSV columns to the appropriate fields, and click Submit.

4. Creating Membership Management Workflows

1. Navigate to Automation: Go to Automation > Workflows.
2. Create a New Workflow: Click Create Workflow.
3. Set Up a Trigger: Click + Add New Trigger, choose Contact Tag > Tag Added, and set the trigger to the relevant member tags, e.g., New Member.
4. Add Automated Actions: Click + Add New Action and add actions like Send Email, Send SMS, Add Task, and Add Tag.
5. Activate the Workflow: Click Save and toggle the switch to activate.

Example Workflow: New Member Welcome Series

- Trigger:Contact Tag > Tag Added > New Member
- Actions:

1. Send Email: Subject: Welcome to [Church Name], {{contact.first_name}}!
2. Send SMS: 🎉 Welcome to [Church Name], {{contact.first_name}}! Let us know if you need anything or have any questions. 🕊️
3. Add Task: Task name: "Follow up with {{contact.first_name}}", Assign to: [Staff Member], Due Date: 2 days from Trigger Date
4. Add Tag: Tag name: `First-time Visitor Follow-Up`

Additional Tips

Segment Lists: Use tags and custom fields to segment members into relevant lists for personalized communication

Build God's House with Excellence

Whatever you do, let these verses inspire you to carry out all your tasks with dedication, excellence, and a sincere heart aimed at honoring God.

Colossians 3:23-24 "Whatever you do, work at it with all your heart, as working for the Lord, not for human masters, since you know that you will receive an inheritance from the Lord as a reward. It is the Lord Christ you are serving."

Proverbs 16:3 "Commit to the Lord whatever you do, and he will establish your plans."

Ephesians 6:7-8 "Serve wholeheartedly, as if you were serving the Lord, not people, because you know that the Lord will reward each one for whatever good they do, whether they are slave or free."

Galatians 6:9 "Let us not become weary in doing good, for at the proper time we will reap a harvest if we do not give up."