



4I's Consulting

Top 10 Things Every School Should Automate

How schools can save time, strengthen relationships and grow their community with smart automation.

Introduction

Schools are busier, leaner and more digitally connected than ever. Whether you're running an alumni office, a development function, or a whole-school community platform, the pressure is the same: *do more, with less, while keeping every stakeholder engaged.*

ToucanTech gives schools a powerful, all-in-one system to automate the repetitive tasks that drain time - and free staff to focus on relationships, stewardship, and strategy.

Below are the Top 10 automations every school should implement using ToucanTech, based on sector best practice and the platform's built-in capabilities.

1. Automated Alumni & Community Email Journeys

From welcome sequences to re-engagement campaigns, ToucanTech's email engine lets schools automate:

- onboarding for new alumni
- segmented newsletters
- event reminders
- donor stewardship flows

This ensures consistent, timely communication without manual chasing.

2. Event Registration, Reminders & Follow-Up

Events are the heartbeat of school communities. ToucanTech automates:

- sign-ups
- confirmations
- reminders
- post-event surveys
- attendance logging

Staff spend less time on admin and more time hosting meaningful events.

3. Donation Processing & Gift Acknowledgements

Fundraising teams can automate:

- instant donation receipts

- pledge reminders
- recurring gift processing
- campaign updates

This strengthens donor confidence and ensures no gift goes unacknowledged.

4. Online Forms & Data Capture

ToucanTech's forms feed directly into the CRM, allowing schools to automate:

- alumni updates
- volunteer sign-ups
- mentoring interest
- job postings
- directory submissions

No more manual data entry or lost information.

5. Personalised Website Content & Permissions

By using gated content and group-specific pages, schools can automate:

- personalised dashboards
- tailored news feeds
- access to resources
- content visibility based on year group, role, or interest

It creates a modern, intuitive experience for every user.

6. Membership & Group Management

ToucanTech automatically maintains:

- year-group cohorts
- interest groups
- professional networks
- mentoring groups

This keeps communities organised and ensures the right people receive the right content.

7. Career Networking & Mentoring Matches

Schools can automate:

- mentor/mentee matching
- job board notifications
- career directory updates

This supports pupils and alumni with real-world connections and opportunities.

8. Payments for Events, Donations & Shop Items

ToucanTech's integrated payments allow automation of:

- receipts
- confirmations
- membership fees
- merchandise orders

Everything is logged against individual records for full transparency.

9. Engagement Tracking & Database Updates

ToucanTech automatically logs:

- email opens
- event attendance
- donations
- website activity

This gives schools a clear picture of who is engaged and who needs a nudge.

10. Multi-Channel Community Engagement

ToucanTech brings together:

- email
- website
- events
- fundraising
- directories

Schools can automate cross-channel journeys that cultivate long-term relationships and strengthen a thriving, connected community.