Final Steps to Success

4/19/23
Submit Your Questions!

This is being recorded. The recording will be available on the /trainings page by 4/21.

If you have questions or comments throughout our training, please write in using your Zoom webinar attendee panel.

Introduce yourself! Name, location, organization.
Agenda

- Giving Day Updates & Reminders
- Your Checklist for Success
- After Giving Day
- Next Steps
- Q&A
Giving Day Updates and Reminders

- Key Dates Page
- Donations Open / Close
- Prizes
- Social Media Feed
Your Success Checklist

- Ready for Donations?
- The Perfect Profile
- Gamify with Matches & Challenges
- Engage Ambassadors
- Prepare Communications
Are you able to accept donations?

- Add Your Organization's Info
- Add Your Story
- Get Verified to Collect Donations

**Status: Verified**
Hooray! Your organization has been verified to accept donations on GiveGab.

- Confirmed state fundraising compliance
- Bank account and organization information verified
Will you have cash or check gifts?

- Add cash and check donations to your Giving Day totals
- See “Donation Tools” on your admin dashboard below your checklist
- Attribute to a support area or fundraiser
- Receipts can be sent to donors when an email address is included
Is your profile complete?

Have you:

- Added your logo and a cover photo?
- Shared an authentic story?
- Set goals?
- Included clear calls to action?
- Featured visual content?
- Highlighted donation levels?
- Invited your fundraisers?
Have you secured a matching gift?

- **Why?**  
  - Organizations who set up a Match or Challenge for raise (on average) more!

- **Strategize**  
  - Set up your match in a way that draws donor attention  
  - Credit the sponsors to cross-promote

- There’s still plenty of time to start this year!

- First time? Keep it simple.

- **Pro Tip:** Watch the Matches & Challenges training
Your Matching To-Do List

- Identify sponsors to ask
- Secure commitment
- Add Matches and Challenges to your Giving Day profile
- Verify your match setup with GiveGab support
- Curate communications to highlight your match
What’s New for 2023?
Do you have ambassadors?

- **Expand your organization’s reach** by asking individuals to share your page
- Go one step further: Ask them host their very own fundraising page (Peer-to-Peer)
- Anyone can be an ambassador or a fundraiser
- **Pro Tip:** Watch the Peer-to-Peer Fundraiser training video
Setting Up For Success

- Set up a quick info session for Ambassadors and Peer-to-Peer Fundraisers
- Walk them through the **Giving Day Fundraiser Guide**
- Communicate your organization’s goals
- Create a simple, suggested timeline for communications
- Provide them with the links they need to share out
- Walk P2P Fundraisers through creating their profile
Do you have a communications plan?

- Plan your online communications ahead of the day
  - How many posts and when?
  - What will your content look like? Examples below:
    - Announcement/Save the Date
    - Campaign Countdown
- No need to start from scratch! Customize the templates available in your Giving Day Nonprofit Toolkit
How will you communicate?

- Utilize multiple online channels
  - Social Media
  - Email and direct mail communications
- C.O.P.E. Create Once, Post Everywhere!
- Curate authentic visual content
- Pro Tip: Create QR codes for your profile
Post-Giving Day Success
How will you get your donations?

- Donations will be deposited on a rolling basis 5-7 business days after a gift is made.
- Deposits will appear on your account from “Stripe”.
- Reference your **new** Financials report to reconcile deposits!
Finding Your Donor Data

Admin Dashboard

Recent Donations

<table>
<thead>
<tr>
<th>Date</th>
<th>Donor Name</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/24/2020</td>
<td>Kyle Cundy</td>
<td>$100.00</td>
</tr>
<tr>
<td>9/10/2020</td>
<td>Kyle Cundy</td>
<td>$100.00</td>
</tr>
<tr>
<td>9/2/2020</td>
<td>Kyle Cundy</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>8/12/2020</td>
<td>Board of Giving Theatre</td>
<td>$100.00</td>
</tr>
<tr>
<td>8/12/2020</td>
<td>Kyle Cundy</td>
<td>$100.00</td>
</tr>
<tr>
<td>6/3/2020</td>
<td>Kyle Cundy</td>
<td>$100.00</td>
</tr>
<tr>
<td>3/27/2020</td>
<td>Bridget Cafaro</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>1/16/2019</td>
<td>McKenna Prize</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>9/27/2018</td>
<td>Jesse Saldana</td>
<td>$9,989.00</td>
</tr>
<tr>
<td>6/20/2018</td>
<td>Rebekah Casad</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

View All Donations
Filtering Your Data

Donations

Dates and times on this page are displayed in your computer's time zone. If you export your donations from this page, dates and times in that file will appear in UTC to assist with bank statement reconciliation processes. Learn More

Search by name or email

All Giving Days & Community Give ▼ All Campaigns ▼ Any Donation Type ▼

<table>
<thead>
<tr>
<th>Actions</th>
<th>Donation ID</th>
<th>Date</th>
<th>Donor</th>
<th>Intended Donation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6554</td>
<td>11/22/2021</td>
<td>katrina grein</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>12:42PM</td>
<td><a href="mailto:katrina@giveab.com">katrina@giveab.com</a></td>
<td></td>
</tr>
</tbody>
</table>
## Exporting Your Donor Data

<table>
<thead>
<tr>
<th>Transaction ID</th>
<th>Date</th>
<th>Time</th>
<th>Donor Name</th>
<th>Email Address</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5467</td>
<td>2/10/2021</td>
<td>10:40AM</td>
<td>Laryssa Habert</td>
<td><a href="mailto:laryssa.habert@givegab.com">laryssa.habert@givegab.com</a></td>
<td>$5.00</td>
</tr>
<tr>
<td>5439</td>
<td>2/2/2021</td>
<td>2:23PM</td>
<td>Jonathan Nay</td>
<td><a href="mailto:jon.nay1@givegab.com">jon.nay1@givegab.com</a></td>
<td>$25.00</td>
</tr>
<tr>
<td>5438</td>
<td>2/2/2021</td>
<td>2:21PM</td>
<td>Jonathan Nay</td>
<td><a href="mailto:jon.nay1@givegab.com">jon.nay1@givegab.com</a></td>
<td>$25.00</td>
</tr>
</tbody>
</table>

- Export CSV
- Edit Bank Account Info
How will you thank your donors?

- Start during and right after the day!
- Treat your donors like your heroes
- Talk about how their gift had a tangible impact, and what you were able to achieve as a result
- Review your donor data, compare it to previous years
- Watch the available training on Donor Stewardship!
How will you thank your donors?

- Pre-schedule general messaging to all supporters
  - Social media posts and overall success update
  - Thank You email to your organization’s email list

- Follow up with individual donors
  - Access their contact information in your GiveGab Dashboard, keep an eye out for anonymity!

- Highlight impact of donor-funded projects with updates
  - What did these donors do for your organization as a result?
  - This outreach can happen a few weeks after
‘Thank You’ Resources

- Customizable Email Templates and Guides for stewardship
- Sample Social Media Posts and Best Practices
- Giving Day Downloadable Graphics
- Resources for Board Members and P2P Fundraisers
- Blog Articles and How-To Videos from GiveGab
Next Steps
Key Takeaways

● Make sure your profile reflects your story and your organization’s voice
● Use authentic, visual content
● Work with your top supporters to be ambassadors or fundraisers
● Secure potential matches
● Develop a stewardship plan for your donors
Final Checklist

- Complete your profile!
- Ensure you are verified to collect donations in GiveGab
- Keep an eye out for important emails!
- Follow Your Giving Day on Social Media and use their Hashtag!
- Watch on-demand training course videos
- Check out the Nonprofit Toolkit
How We Support You

- Visit Our Help Center
  - support.givegab.com
- Check Out Our Blog
  - givegab.com/blog
- Send us an Email
  - CustomerSuccess@givegab.com
- Chat with GiveGab’s Customer Success Team

Chat with GiveGab’s Customer Success Team whenever you have questions or need a hand! Just look for the little blue chat bubble.
Questions?