

# Virtual Donor Simple Campaign Planning Checklist

Task Name	Due Date	Done	Assigned To	Status	Comments
1 <input type="checkbox"/> <b>FUNDRAISING PLAN</b>		<input type="checkbox"/>			
2 <input type="checkbox"/> <b>DEFINE OUTCOMES</b>		<input type="checkbox"/>			
3 Overall goal of the campaign		<input type="checkbox"/>			
4 Select a focus		<input type="checkbox"/>			
5 Fundraising strategy fit		<input type="checkbox"/>			
6 Financial Goal		<input type="checkbox"/>			
7 Determine the ask		<input type="checkbox"/>			
8 <input type="checkbox"/> <b>GOAL SETTING</b>		<input type="checkbox"/>			
9 Dollars Raised		<input type="checkbox"/>			
10 # of donors to donate		<input type="checkbox"/>			
11 % to become recurring donors		<input type="checkbox"/>			
12 Gave a Major Gift		<input type="checkbox"/>			
13 Volunteered		<input type="checkbox"/>			
14 # of Gifts		<input type="checkbox"/>			
15 2nd Gift to organization		<input type="checkbox"/>			
16 # of donations/amount received each week		<input type="checkbox"/>			
17 <input type="checkbox"/> <b>HISTORICAL DATA REVIEW</b>		<input type="checkbox"/>			
18 Past Giving (select # of years to review)		<input type="checkbox"/>			
19 Dollars raised		<input type="checkbox"/>			
20 Method of Giving - online, check		<input type="checkbox"/>			
21 Digital Giving channel used		<input type="checkbox"/>			
22 Lapsed donors		<input type="checkbox"/>			
23 Best method of out reach		<input type="checkbox"/>			
24 ROI / COI returns		<input type="checkbox"/>			
25 Define your metrics		<input type="checkbox"/>			
26 Review historical data		<input type="checkbox"/>			
27 Build a benchmark (Metric Chart)		<input type="checkbox"/>			
28 <input type="checkbox"/> <b>MARKETING ENGAGEMENT PLAN</b>		<input type="checkbox"/>			
29 <input type="checkbox"/> Marketing expectations		<input type="checkbox"/>			
30 % of goal expected		<input type="checkbox"/>			
31 <input type="checkbox"/> Digital Foundation review		<input type="checkbox"/>			
32 CRM		<input type="checkbox"/>			
33 Marketing Tools		<input type="checkbox"/>			
34 Digital Giving Channels		<input type="checkbox"/>			
35 <input type="checkbox"/> Define Online Outreach methods		<input type="checkbox"/>			
36 Video		<input type="checkbox"/>			
37 Social media		<input type="checkbox"/>			
38 Email		<input type="checkbox"/>			
39 Event Type (Virtual / In-person)		<input type="checkbox"/>			
40 Peer to Peer		<input type="checkbox"/>			
41 Website		<input type="checkbox"/>			
42 Giving Day		<input type="checkbox"/>			
43 Other		<input type="checkbox"/>			
44 <input type="checkbox"/> <b>MESSAGING</b>		<input type="checkbox"/>			
45 What are you trying to convey		<input type="checkbox"/>			
46 Desired outcome / action		<input type="checkbox"/>			
47 <input type="checkbox"/> <b>DELIVERABLES</b>		<input type="checkbox"/>			
48 Build calendar timeline		<input type="checkbox"/>			
49 Dates of the Campaign		<input type="checkbox"/>			
50 Materials required* (outreach)		<input type="checkbox"/>			
51 Website requirement		<input type="checkbox"/>			
52 Printed Materials		<input type="checkbox"/>			
53 Content		<input type="checkbox"/>			

Task Name	Due Date	Done	Assigned To	Status	Comments
54 Video Content		<input type="checkbox"/>			
55 <b>CONTINUED ENGAGEMENT</b>		<input type="checkbox"/>			
56 Pause to Celebrate		<input type="checkbox"/>			
57 <b>METHOD OF THANK YOU</b>		<input type="checkbox"/>			
58 Note: This is beyond the email receipts		<input type="checkbox"/>			
59 Video message		<input type="checkbox"/>			
60 Phone calls (Board or Staff)		<input type="checkbox"/>			
61 <b>COMMUNICATION</b>		<input type="checkbox"/>			
62 Share results with donors		<input type="checkbox"/>			
63 Share how their dollar were utilized		<input type="checkbox"/>			
64 Ask to get involved - volunteering		<input type="checkbox"/>			
65 Invite to next interaction/event/program		<input type="checkbox"/>			
66 Nurturing Campaign		<input type="checkbox"/>			
67 <b>CURRENT MARKETING</b>		<input type="checkbox"/>			
68 Newsletter		<input type="checkbox"/>			
69 Annual report		<input type="checkbox"/>			
70 Like on Facebook		<input type="checkbox"/>			
71 Added to all outreach		<input type="checkbox"/>			
72 <b>DONOR DEVELOPEMENT</b>		<input type="checkbox"/>			
73 Assigned for follow up		<input type="checkbox"/>			
74 added to future outreach		<input type="checkbox"/>			
75 identify next step on donor journey		<input type="checkbox"/>			
76 <b>REVIEW AND RECAP CAMPAIGN</b>		<input type="checkbox"/>			
77 Result against matrix of success		<input type="checkbox"/>			
78 Finanical goal met		<input type="checkbox"/>			
79 What worked?		<input type="checkbox"/>			
80 What can we do better?		<input type="checkbox"/>			
81					
82					
83 <b>HELPFUL RESOURCES</b>		<input type="checkbox"/>			
84 Hootsuite - <a href="http://www.hootsuite.com">www.hootsuite.com</a>		<input type="checkbox"/>			Social media scheduling
85 Constant contact - <a href="http://www.constantcontact.com">www.constantcontact.com</a>		<input type="checkbox"/>			Email marketing
86 Mail Chimp - <a href="http://www.mailchimp.com">www.mailchimp.com</a>		<input type="checkbox"/>			Email marketing
87 Emma - <a href="http://www.myemma.co">www.myemma.co</a>		<input type="checkbox"/>			Email marketing
88 Canva - <a href="http://www.canva.com">www.canva.com</a>		<input type="checkbox"/>			Design
89 Unsplash - <a href="http://www.unsplash.com">www.unsplash.com</a>		<input type="checkbox"/>			High-res photos
90 Trello - <a href="http://www.trello.com">www.trello.com</a>		<input type="checkbox"/>			Spreadsheets/ boards
91 Smartsheets - <a href="http://www.smartsheets.com">www.smartsheets.com</a>		<input type="checkbox"/>			Marketing Calendar
92 Vidyad - <a href="http://www.vidyard.com">www.vidyard.com</a>		<input type="checkbox"/>			Video Thank you
93 iDonate - <a href="http://www.idonate.com">www.idonate.com</a>		<input type="checkbox"/>			Digital Giving Solution