Running a $100k Crowdfunding Campaign

A Guide to Major Crowdfunding

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First things first

- Overview
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Overview

This plan will deliver a clear idea of the steps required to launch a large, successful crowdfunding campaign. Much of this is targeted at nonprofits, but is applicable beyond the nonprofit sector.

Each section contains a set of goals, key questions to answer, recommendations, and the next steps to take. Crowdfunding is not magic - there is methodology, and it can be learned.

Choice of Platform

Once you’ve decided that donation- or reward-based crowdfunding is for you, you’ll need to pick a platform. We address this first because it is often the first question in people’s minds, though - perhaps surprisingly - it is actually not the most important thing to worry about.

<table>
<thead>
<tr>
<th>Goals:</th>
<th>★ Decide on the best platform to host the campaign. ★ Establish a good working relationship and product brief with the supplier. ★ Set deadlines for key deliverables and launch.</th>
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</table>

| Key questions: | ➔ If needed, can the platform support payments globally? ➔ If needed, can the platform process tax-efficient donations in the US and UK? ➔ How do the offline and online payment flows work? ➔ If needed, can the platform host multi-lingual campaigns? ➔ Can offline donations be added to a campaign in real time? ➔ Can matched funding be added to a campaign? If so, is this in real time? ➔ Can the donation flow collect the required data from |
donors, and will this data be yours to use afterwards?

- Can the platform export the required data in a CRM-ready format?
- Is the technology robust enough to support a significant campaign?
- Will the platform help generate positive public awareness of the campaign?

**Recommendations:**

There is normally a reasonably simple decision to make. There are two types of platform that can support nonprofit campaigns. On the one hand, you have the well-known “monolithic” platforms such as Kickstarter, IndieGoGo, Crowdfunder or JustGiving. On the other is a whitelabel / own-brand platform such as Hubbub (or everydayhero, ScaleFunder, Community Funded, etc).

The benefits of the former (e.g. Kickstarter) are often listed as high donor trust, the potential for more traffic, and the low setup costs. The reality though is that almost all of the initial backing for campaigns comes from your own friends, family and existing networks (so trust is unlikely to be a problem). Your campaign is also very unlikely to be one of Kickstarter’s priorities unless it has already achieved massive scale (since they only make money on commission, they need their promoted projects to raise an awful lot).

It is true, however, that the setup costs are low using a “monolithic” provider.

The benefits of the latter (e.g. Hubbub) are much greater customization and control, including of data / stewardship and branding. The most important element here is typically
ownership and control of the relationships and data you secure from your campaign. It is important to see the crowdfunding campaign as just the first step on your supporter journey - and to really maximize this long-term relationship, you need to have ownership of the data, and consent to use it. This can only really be achieved by using a whitelabel or own-brand solution.

**Example - payment flows:**

For most nonprofits, it is also of critical importance to formalize the flows for both online and offline payments and have these flows approved by your financial teams. Some payments may be made “offline” - e.g. by cheque, or pledges made over the phone. There needs to be a formally signed-off set of accepted payment flows that guarantee that:

- the correct data is collected.
- the money ends up in the right place.
- there is clear responsibility for the processing (e.g. this must be someone’s job).
- tax efficient giving status is not compromised.
- the gift is properly represented and included in the campaign total on the platform.

It’s common for platforms to ask you to pay commission on donations or pledges made outside the platform, if you want that donation reflected on the campaign. This can present you with a real problem. It’s not uncommon for larger donors to wish to give amounts of over $1k other than via a website. You’ll clearly want to represent these larger sums on the campaign, to take you closer to the target, but you won’t want to give up 5% or more of the gift
in order to do so. Some platforms do not allow you to add pledges received offline at all, whether you pay commission or not.

Given the complexity of nonprofit demands and the interface between donor relations, marketing, stewardship, data, payment flows and tax efficient giving, our recommendation for most larger ($100k+) campaigns is to use a whitelabel provider. If you have a lot of time (at least six months) to try to negotiate with Kickstarter or another platform to get their agreement to back you, or if you are running a smaller (<$50k) campaign, you may be able to justify using one of the monolithic providers as their up-front costs can be cheaper than using a whitelabel solution.

If you look through the kinds of questions nonprofits often need to ask when it comes to crowdfunding (in the Key Questions above), it gets tricky to use the monolithic platforms, as they often fall over on things such as GiftAid, reporting, data, stewardship, etc. Therefore the decision the team needs to make is to balance the opportunity for additional promotion against the downsides of not being able to add in offline donations, matchfunding, additional payment flow customization, etc.

Either way, whoever you go with you should work out the answers to all of the questions above in advance, alongside any fees that will be incurred, and decide which platform works best for you. The key thing to remember is that platforms do not bring donors, you do, so it’s very important not to attribute too much weight to the potential “network” or “crowd” of the major platforms.
Next steps - key work:

➔ Write up a specification for the platform requirements, detailing what is essential, and what is desired - draw on the Key Questions above.
➔ Approach suppliers for a quote on the specification, or responses to the questions you’ve raised.
➔ Decide on a preferred supplier and commence work on your campaign.

We are happy to provide further assistance with a detailed specification on request, and can also introduce you to suppliers if necessary.

Amounts - Estimates and Modelling

Deciding how much to raise is a seriously challenging question, and one that is often at the front of the mind of most people approaching crowdfunding for the first time. For major projects, there is a fine balance between setting a realistic and aspirational goal, and also in deciding between “all-or-nothing” or “keep-it-all” funding models. These decisions also play into your choice of technology (as above). Make sure that the provider can support the model you actually want to use.

Goals:
★ Determine a sensible initial target for the campaign.
★ Determine "stretch goals".
★ Decide whether to message this as an all-or-nothing or a keep-it-all campaign.

Key questions:
➔ How much should you raise?
How do you message this?

**Recommendations:**

Normally, a goal is set with a combination of top-down and bottom-up approaches.

Top-down approaches look at the scale and ambition of the project and the funds required to make a significant difference to the campaign. Bottom-up approaches look at the network, and determine what level of support is likely or possible from it.

Various platforms have different models for the campaign goals. All-or-nothing funding means that when you set a target, you will only receive the funds if you reach that target. Keep-it-all does what it says on the tin - even if you don't reach the target, you’ll get to keep the pledges.

All-or-nothing models create urgency and a strong motivation for donors to give. As a result, they are significantly more successful, so we recommend using them if possible. However, obviously they come with the risk of absolute failure. Therefore it is usually advisable to set targets at such a level that they are likely / almost guaranteed to be met. We then advise raising additional targets ("stretch goals") as the campaign grows.

When looking at the target amounts to set for “all or nothing” campaigns, our recommendation is to use a combination of bottom-up modelling tools applied to estimated network sizes, as well as top-down project targets. This allows you to to ascertain a range of scenarios for fundraising, and also to highlight the key challenges to achieving your goal.
For a project, try to determine your aspirational targets based on a top-down approach. For example:

<table>
<thead>
<tr>
<th>If we raise</th>
<th>We will</th>
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<tbody>
<tr>
<td>$250k</td>
<td>Run the opening exhibition</td>
</tr>
<tr>
<td>$500k</td>
<td>Open a new wing of the building</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
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</tbody>
</table>

Bottom-up approaches normally employ a “money table”, identifying key constituents who could contribute to the campaign, approximate sizes of these bases, conversion rates, and average donation sizes. For example:

<table>
<thead>
<tr>
<th>Network constituent</th>
<th>Average Donation</th>
<th>How many?</th>
<th>Conversion?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museum visitor</td>
<td>$10</td>
<td>25,000</td>
<td>2%</td>
</tr>
<tr>
<td>Facebook page like</td>
<td>$5</td>
<td>5,000</td>
<td>5%</td>
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</table>
Hubbub has developed a crowdfunding simulator, which uses an extended version of the money table to simulate a campaign using a method known as Monte Carlo simulation. It produces reasonably well-bounded estimates of the amounts that can be raised from the existing network using a bottom-up approach.

An analysis of the alignment and overlap between the top-down and bottom-up approaches will inform your choice of appropriate minimums and goals for the project, and will also provide clear guidance for how to position stretch goals.

Next steps - key work:

➔ Perform network analysis.
➔ Engage with Hubbub to test campaign simulation tools.
➔ Create a top-down target table.
➔ Evaluate the overlap and decide on goals.
Campaign Messaging

Team

Networks

Campaign Framework: Influencer Communications

Campaign Framework: Public Communications
<table>
<thead>
<tr>
<th>Goals:</th>
<th>★ Ensure one, clear, crisp message for the campaign.</th>
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</table>
| Key questions: | ➔ What will the campaign deliver, if successful?  
 ➔ Why should donors give? |
| Recommendations: | Campaign messaging needs to be positive, clear and consistent. This quality of messaging is rarely arrived at by individuals alone. Instead, it is generally advisable to arrange campaign messaging workshops, typically of the following form: |

1. Start with a half-day to one-day workshop with key team members, in a brainstorm session. Look at the organizational mission, vision and values, as well as the campaign aims. The aim is to ensure that people feel their views are represented, listened to and included, and to tease out all possible key messaging.

2. One person takes on the task of collating the messaging suggestions into a simple set of statements about intentions, ambition, philosophy and values.

3. This person presents this back to the group for approval or modification. Repeat steps 2 and 3 until you arrive at consistent, engaging messaging.

We recommend undertaking these exercises as soon as possible. Messaging is absolutely central to creating campaign materials and to campaign storytelling, which is itself absolutely essential to the virality of the campaign. Messaging for the campaign is therefore more important than any other section included here.

We are happy to assist either by running the workshop, or by
providing recommendations of others who can facilitate. Alternatively we can signpost some digital resources to help you run these workshops in house.

Once you have decided on your key campaign messages, you need to create a simple pack of supporter materials, including:

➔ four to five key sentences expressing the campaign goals.
➔ hashtags for social media.
➔ suggested social media messages.
➔ one-pagers about the campaign.
➔ suggested email messages.
➔ campaign branding and color schemes.
➔ campaign imagery.
➔ a campaign video.

This material needs to be created and published somewhere easily accessible to all relevant parties before, during and after the campaign.

Next steps - key work:

➔ Decide who is delivering the workshops.
➔ Run the workshops.
➔ Create materials for the campaign off the back of the messaging.
➔ Share / distribute these materials.
| **Goals:** | ★ Ensure the campaign is resourced appropriately.  
★ Establish communications patterns for the team. |
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</thead>
<tbody>
<tr>
<td><strong>Key questions:</strong></td>
<td>➔ How should we hire the team and structure interactions?</td>
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</table>
| **Recommendations:** | We recommend that for a minimum of three months before and one month (ideally three months) after the campaign, there is a full time campaign manager dedicated to it. We also advise three to four days a month as the minimum necessary strategic / advisory input from an expert who has previously run a major campaign - ideally one we have trained. We also advise one to two days of full-time training from an expert prior to the kick-off of campaign planning. Hubbub can provide expert campaign advice on this basis, or we can recommend others with the experience to assist.  
  
Team interactions for a campaign such as this are best run with:  

➔ daily "stand-up" meetings, where each team member reports for one to two minutes on what they will be doing during the day, and asks any key questions of the rest of the team. Ideally these are held first thing in the morning, and they are called "stand-ups" because the intention is for the meetings to be done standing up to keep them below ten minutes.  

➔ weekly "check-in" meetings, ideally on the first working day of the week - to review progress of the campaign and identify any longer term issues or opportunities that might not have come up at stand-ups. These
meetings should be attended by the external consultant if possible, and should last up to an hour.

Next steps - key work:

➔ Hire a campaign manager (we can assist with the job description if required).
➔ Decide on external consultant support (recommendations available on request).
➔ Agree on a team interaction plan.

Networks

Networks are the bedrock of any campaign. You need to map existing networks, pinpoint the influencers and influences of these networks, and identify potential networks that you are yet to build, which will be important for the campaign.

Goals:

★ Identify key influencers from the organization’s network.
★ Estimate the size of potential end donor bases, and look at (non-viral) routes to reaching them.
★ Build an engagement strategy for key donor groups and test campaign messaging.

Key questions:

➔ Who do we know who could help shape and spread the campaign?
➔ How big is the potential donor base?
➔ Are they receptive to our message? How can we change it, if not?
**Recommendations:**

We strongly recommend undertaking network mapping workshops: two to three hour sessions that enable a group of people connected to an organization or campaign to brainstorm networks in an open manner. These allow everyone to contribute their ideas, connections and channels in a way that will help maximize campaign engagement.

These workshops are not particularly hard to deliver, but ideally you will want to train key staff in running them, so they can be repeated several times to ensure maximum network exposure. Typically, organizations will have several constituent groups who can help with network mapping - e.g. trustees, fundraising staff, the campaign team, directors, focus groups, etc.

Once you have mapped influencers, you should also run bottom-up network mapping, focusing on key subsets of potential "public" support for the campaign - e.g. those who are likely to give $500 or less but the vast majority of whom may not be within your inner circle. This builds the "money table" for the campaign (mentioned earlier), and will help us to simulate the campaign and generate suggested targets.

**Next steps - key work:**

- Identify opportunities to run the workshop inside all key groups of staff.
- Receive training and/or materials to run the workshops.
- Collate the results.
- Run bottom-up analysis of potential donor networks.
- Add key influencers and donors to your pipeline management tool (see later).
- Send bottom-up mapping to your simulation tool.
Campaign Framework: Influencer Communications

This is one of the most important pieces of the crowdfunding puzzle.

<table>
<thead>
<tr>
<th>Goals</th>
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<tbody>
<tr>
<td>★ Identify <strong>who</strong> the influencers are, <strong>how</strong> to reach them, <strong>what</strong> you want them to do, and what the <strong>next actions</strong> are for this engagement.</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Key questions:</th>
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<tbody>
<tr>
<td>➔ How do we deliver the goal?</td>
</tr>
<tr>
<td>➔ Who is/are the key member(s) of the team who will interface with influencers, major donors, celebrities and media?</td>
</tr>
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<table>
<thead>
<tr>
<th>Recommendations:</th>
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<tbody>
<tr>
<td>It’s vital to establish and coordinate a team of people who are responsible for communications with potential “influencers” and “ambassadors”. These will be the lifeblood of your campaign - forming both the innovator and early adopter groups as well as being the “social proof backbone” of your campaign (see below). Often your ambassadors are not the campaign team itself, but high profile members or supporters of your cause - such as your board or trustees - or even their friends and families.</td>
</tr>
</tbody>
</table>

This section covers the basics of creating the engagement plan, getting your internal stakeholders on board, and coordinating...
them to deliver what is required.

We suggest identifying the key members of the team who are most likely to interface with potential influencers across different categories e.g. press, celebrities, community groups, etc. Get these staff into a meeting room, and run through with them each potential target identified in the network mapping exercise, with a view to answering the key questions in the goal (who, how, what, etc). We suggest you invite any external consultancy into this meeting, as it can help with facilitation.

For each potential influencer, you should be able to identify a next action and assign this to a person, along with a date for this to be done by. The campaign manager is responsible for collating the outcomes of these engagement, and defining next actions after the initial interaction. If a clear next action cannot be identified, the potential influencer should be removed from the list, as it is unlikely that any useful progress can be made with them.

It is possible to break the meeting down into different meetings if, for example, the key people interfacing with media do not overlap with those interfacing with celebrities.

**Taking advantage of social media**

Below is the well-known engagement cycle, which will be familiar to most business graduates:
The premise is that people fall into loose categories:

- **Innovators:**
  those who will engage with / buy your product, or get involved in your campaign, with minimal friction. These will often be people connected to you, or those who share the same vision as you for the future.

- **Early Adopters:**
  people who are not necessarily aligned on your vision, but are driven by a desire to be first, because what you are doing is cool, and it’s cool to be first.

- **Early Majority and Late Majority:**
  where most people are. They exist on a continuum. Typically, Early Majority will engage with someone if they can see at least a few proof points of others – people like them – doing the same. Typically Late Majority will engage with someone if they fear they will be left behind without it.
- **Laggards:**
  these are those who are late to the game, and who really only engage because of the fear of missing out (FOMO, in modern web parlance).

In his seminal book "Crossing the Chasm: Marketing and Selling High-Tech Products", Geoffrey Moore observed that there can be great difficulty in crossing the gap between Early Adopters and Early Majority. There are vastly different motivations between the groups, and it can be very difficult for those in the Early Majority to adequately assess whether anyone else is using a particular solution or engaging with a particular campaign. What is happening in the Early and Late Majority segments is that ever-increasing “social proof” is required to get people to engage. This can only be delivered by showing people in those groups that others like them are playing ball.

With direct marketing-based solutions, this same problem exists in fundraising and engagement. The vast majority of our audiences will only engage if they see others also doing so. If you imagine a telephone or direct mail campaign where 90%+ of the respondents will only participate if they can see that one of their friends has already participated, you can see that we run head first into a brick wall.

At its core, digital – largely due to the use and rapid growth of social media – is fundamentally different, because communication is networked. Whilst there are institutional pages and accounts, the vast majority of communication is peer-to-peer. In this way, social media provides us with the tools to encourage those who have engaged to demonstrate
and publicize their participation. This increases the visibility of the “early adopters” and provides the social proof needed to crack the majority.

Next steps - key work:

➔ Establish the key influencer engagement team and get their buy-in.
➔ Organise kick-off meeting(s).
➔ Run meetings and agree next actions.

Campaign Framework: Public Communications

Public segments - such as those on social media or other subsets of the community - will need to be targeted with relevant, compelling stories and messaging, as covered earlier. To actually determine which messaging works, don’t just rely on your collective brainpower - you can do better. Invite these users in, and discuss it with them. This section briefly covers what you need to do to get this to happen.

| Goals:          | ★ Test and refine key campaign messages with all important public segments.  
|                | ★ Validate a strategy for reaching and engaging segments.                  |

Key questions:

➔ How do we get a representative sample of each segment from the network mapping?
➔ How can we best run “workshops” with these segments to test messaging?
➔ How do we validate our outreach and engagement
Recommendations:

Each segment is likely to require very different methods of approaching and engaging, so we advise waiting until after a detailed networks analysis has been undertaken before creating specific engagement plans. The only solid commitment needed at this stage is to commit to running a messaging workshop or session with each key segment to validate (or refine) the proposed campaign messaging.

Once messaging has been agreed and tested with segments, you need to identify the channels by which these segments can be reached. At this stage, a workshop meeting should be arranged, involving the stakeholders responsible for managing influencers and press, in order to detail the next actions needed to reach each segment. Any segment where a clear next action cannot be identified, and an additional potential influencer cannot be identified and engaged, should be removed from the campaign plan, as it will be difficult to generate deliberately managed traction. (It may still be possible for the campaign storytelling to engage the segment, but it will not be something that is delivered through influencer planning, so it does not need detailed management).

Next steps - key work:

➔ Pick a date that is between three to six months off.
➔ Reflect campaign dates in your messaging.
Planning

★ Launch and Timing
★ During and Post-Campaign: Messaging / Stewardship
**Launch and Timing**

Campaign launch and timing is obviously important. Too many people plan crowdfunding campaigns poorly and rush them out of the door, leading to poorly messaged and badly resourced campaigns that often struggle to gain traction.

<table>
<thead>
<tr>
<th>Goals:</th>
<th>★ Set dates for the start and end of the campaign.</th>
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</table>
| Key questions: | ➔ How long do you need to plan?  
➤ How long should the campaign run for?  
➤ Are there any political connotations to the date?  
➤ Does a date that is post-launch lose the urgency of the appeal? |
| Recommendations: | We advise that a campaign runs for an initial maximum of three months - and six to eight weeks is better. Successful campaigns can always be extended, so focus first on delivering rapid success and demonstrating momentum. The launch date should give you enough time to successfully:  
• hire or engage key staff,  
• carry out mapping, messaging work and testing, influencer engagement, and stewardship planning,  
• procure and deliver a functional platform.  
Ordinarily, this will require a minimum of three months - and six months would provide greater comfort.  
Any non-crowdfunding project dates that are visible to the public should be considered as part of the campaign messaging. |
For example - "We need your money to launch" will not work if your project is already launched. This is not particularly complex to manage, but the date, project state, messaging, and launch all need to be joined up.

Next steps - key work:

➔ Pick a date that is between three to six months off.
➔ Reflect campaign dates in your messaging.

During and Post-Campaign: Messaging / Stewardship

Communications is the basis for your campaign. It is vital to plan your communications strategy and execute it well, whilst being responsive to inbound opportunities.

Goals:

★ Ensure that donors receive timely and appropriate stewardship messages.
★ Ensure that rewards, when promised, are delivered in a timely manner.
★ Make the best use of the networks you have secured.

Key questions:

➔ What data do you require on donors to best steward them? See "Data" below.
➔ What tools can be used to manage reward delivery at scale?
➔ What tools can be used to manage donor pools at scale?

Recommendations:

Raiser’s Edge or Salesforce’s CRMs will work adequately as
data repositories for donors, but neither is ideal for large-scale, low-touch customer relations need, where small interactions regularly occur with a large number of similar individuals. As a result, it is critical to qualify your donors and achieve a better understanding of their profiles, so you can deal with them appropriately in significant numbers.

For example, major campaigns can achieve several tens of thousands of donors. Many of these donors will give a small amount, and so cannot be individually solicited for further donations. Some however may be regular or major gift prospects, and some may have other influence they can exert. As part of donor stewardship, you should attempt to:

➔ identify those who may have a predisposition to give regularly (this can be built into the platform).
➔ identify those who may have the capability to donate larger amounts through wealth screening or social profiling.
➔ tag the remaining donors with social, demographic and geographic information and also by gift size and reason for giving, to ensure segmented campaigns can be run in future.
➔ transfer this tagged data appropriately into the CRM.

It is also crucial before the campaign begins to identify the actions which will be directed at each group, and create a plan for carrying out these actions. For example, for those who express an interest in giving regularly during the campaign, a personal and immediate follow up email or call would be advisable. For those who are flagged as potential major donors, a visit may be appropriate.
Wealth screening is provided by a number of companies. Social profiling is also globally available.

- Agree on the data being collected.
- Agree on donation flow questions - e.g. "would you like to make a regular gift?"
- Investigate wealth screening options and sign off on their use.
- Investigate social profiling tools and sign off on their use.
- Decide on follow up actions for each segment.
- Communicate the required data to your platform provider(s).
- Test the rapid import of platform export data into your CRM.
Operations

★ Matchfunding / Major Gifts

★ Data

★ Tools
Matchfunding / Major Gifts

Goals:

★ Get a clear idea on how and when to use matchfunding and major gifts.

Key questions:

➔ Is there anyone who will matchfund your campaign or contribute a significant gift?
➔ If so, how and when do you put the money in and/or reflect it in the campaign?
➔ How should you steward / notify that donor (or donors)?

Recommendations:

Matchfunding can super-charge your campaign. Even a relatively small amount of matchfunding provides two key things:

➔ Validation that the project is credible.
➔ Momentum and inspiration for people to get involved early.

In crowdfunding, once a project reaches around 30-40% of its target, it has a 90%+ success rate. There are qualifications to this, and to some extent this reflects the fact that better fundraisers are more likely to reach this target. However, if you think about the social proof dynamics explained earlier, it makes sense that the more successful a campaign appears to be, the more likely people are to want to give to it.

This provides an ideal role for matchfunding. A project can secure around 15-20% of the project’s total target in matchfunding, and this is sufficient to stimulate early gifts,
validate the credibility of the project, and also reach the 30-40% of the total that correlates with success as early as possible.

Most significantly-sized organizations have a tier of low-level major donors, giving $1-10k annually. This tier is typically difficult and expensive to solicit and steward, as their giving is not quite at a level where deep personalization and physical meetings are easy to justify. However, it’s above the level where standard communications and stewardship can be used. This is the ideal target for matchfunding asks, particularly for projects in the $10k to 250k crowdfunding range. Across the Hubbub network, we have seen almost $500k in low-level major donor matchfunding contributed in the past year alone.

Securing these gifts normally requires the involvement of whoever handles the lower-level major donors. Engaging them in the campaign and explaining the value of the lower-cost solicitation and stewardship journey is the best sell. However you’ll need to get used to providing them with more personalized and detailed campaign materials - you can’t just point them at a website.

Next steps - key work:

➔ Talk to your major gift fundraisers about getting one or more low-level major donors involved. In smaller organizations, this might be your CEO or Board.
➔ Prepare a short infopack on the project and the opportunity, which can be presented to the donor(s) in question.
➔ Do this before going live(!)
## Data

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<thead>
<tr>
<th>Goals:</th>
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<tbody>
<tr>
<td>★ Ensure that the correct data is collected throughout the campaign.</td>
<td>★ Ensure that the data is validated, and its integrity maintained.</td>
</tr>
<tr>
<td>★ Ensure that data is imported into a CRM or tracking tool during and/or post campaign in such a way that it can inform the current campaign and add value to future campaigns.</td>
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<table>
<thead>
<tr>
<th>Key questions:</th>
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<tbody>
<tr>
<td>➔ What tools can be used to store and manage the data to ensure high availability and useful insights?</td>
</tr>
<tr>
<td>➔ What data needs collecting, and what would be nice to have if possible?</td>
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</tbody>
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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Salesforce CRM or Raiser's Edge can be used for data storage and availability. We advise that you get a list of essential donor information and a list of desired donor information signed off by the project team prior to campaign launch.</td>
</tr>
</tbody>
</table>

Here is an initial suggestion for the data to include:

**Required:**

- email address
- donation amount and currency
- source of gift (e.g. crowdfunding)

**Desired:**

- full name
<table>
<thead>
<tr>
<th>Next steps - key work:</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ full address</td>
</tr>
<tr>
<td>→ telephone number</td>
</tr>
<tr>
<td>→ tax efficient giving status</td>
</tr>
<tr>
<td>→ reason for giving</td>
</tr>
<tr>
<td>→ Sign off on the CRM.</td>
</tr>
<tr>
<td>→ Sign off on data schemas.</td>
</tr>
<tr>
<td>→ Use your data schema to inform your platform choice.</td>
</tr>
</tbody>
</table>

## Tools

<table>
<thead>
<tr>
<th>Goals:</th>
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<tbody>
<tr>
<td>★ Ensure the project team can:</td>
</tr>
<tr>
<td>● stay in touch on key issues.</td>
</tr>
<tr>
<td>● alert others within the team of important events or opportunities.</td>
</tr>
<tr>
<td>● coordinate activities efficiently with minimal overhead.</td>
</tr>
<tr>
<td>● track progress and provide accountability and visibility.</td>
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<table>
<thead>
<tr>
<th>Key questions:</th>
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<tbody>
<tr>
<td>→ What tools are available to help with the above?</td>
</tr>
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</table>

<table>
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<tr>
<th>Recommendations:</th>
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<tbody>
<tr>
<td>Our recommendation is to use web and mobile tools where possible, to minimize software installation and maintenance.</td>
</tr>
<tr>
<td>The tools we would endorse for good team coordination of a digital campaign are as follows:</td>
</tr>
</tbody>
</table>
1. **Slack** - for distributed team discussion / synchronization. Slack provides distributed teams with a central point to discuss issues and rapidly get questions answered without resorting to long email trails.

2. **Appear.in** or **Skype** - for group video conferencing.

3. **Trello** - for simple project management.

4. **PipeDrive** - for major donor, influencer, and press pipeline management. It is possible you can configure Salesforce CRM to operate as a drop-in replacement for PipeDrive in this respect.

5. **Dropbox** - for sharing key campaign materials.

Training and set up of model projects can be provided on request.

**Next steps - key work:**

- Investigate recommended solutions, and decide which to purchase.
- Purchase key tools.
- Agree intended uses.
- Train team in use.
If you would like to discuss running a major crowdfunding campaign, please don’t hesitate to get in touch with me via 
jonathan@hubbub.net.