Community Funded

The Storyteller
Training Workbook

Build Your Team

Fundraising campaigns require planning and collaboration to achieve the highest level of success. Create a team to assist with writing the narrative, organizing visual and video components to enhance the story, developing an outreach plan, and coordinating thanks.

The team will not only help you spread out the burden of work, but also affords creativity from multiple individuals, and broadens your marketing reach since each team member has their own unique network to pursue. A GoGetFunding study of over 12,000 crowdfunding campaigns found that projects with a team behind them raised 38% more than those managed by a single individual. Plus, by building a team, you're giving others the opportunity to get involved in crowdfunding, learn new skills, and grow from each other's experiences.

Start by identifying the roles you need. There are a few essential roles to fill, although who fills these roles may look different depending on your team and resources. Think critically about the work that needs to be done and how it can be delegated to various team members.

CONSIDER THE FOLLOWING ROLES AS A STARTING POINT

- **Project Lead/Project Manager/Team Leader:** This person is in charge of the direction of the process and the team as a whole. Key responsibilities include:
    - » Determining the vision and setting goal(s)
    - » Delegating tasks
    - » Leading meetings
    - » Maintaining a project plan, including status checks and updates from outreach, through the life of the live story, and active stewardship
    - » Communicating between team members, storytellers and other involved parties

- **Story Curator:** This person that will craft the narrative. This is an incredibly important role. You have to do more than share facts, you have to compel and inspire people to act. This person may also be involved in creating messaging for outreach, updates, and stewardship, ensuring that the messaging all supports the underlying narrative. Key responsibilities include:
    - » Developing the story
    - » Saving story content including campaign descriptions, updates, promotions, and stewardship.
    - » Editing copy

- **Content Manager:** This person manages the flow of content development, review and promotion between all parties. Key responsibilities include:
    - » Manage review and submission of stories
    - » Reviewing and editing story content including campaign descriptions, updates, promotions, stewardship, and photo and video assets

- **Marketing Lead:** This person takes the vision and goals of your overall story from the Project Lead and shares them with the world. They will create multi-channel promotions of the story. Key responsibilities include:
    - » Using a combination of email, social media, direct mail, media mentions, advertising campaigns and event promotion to make the story known
    - » Developing a communication schedule
    - » Critically analyzing the team's list of email contacts, social media friends/followers/connections, and people the team plans to personally reach to help determine a realistic fundraising goal

- **Social Media Lead:** This person develops social media promotional tactics. They will create social media promotion of the story and guide the rest of the team and other supporters in how to share it via their social media channels. This person is often the same as the Marketing Lead. Key responsibilities include:
    » Drafting social media plans and content
    » Determining all active social media channels that can be used for promotion, showcasing of the live story, and communicating thanks
    » Executing best practices for timing and framing of promotion
    » Leading the team and supporters in social media engagement for their stories

- **Content Collector:** This person develops photo and video content for stories to enhance the text storytelling. Key responsibilities include:
    » Taking photos or videos of the organization and its programs
    » Curating photos from previous events, if archives exist
    » Ensuring images are the correct dimensions
    » Preparing images for social media channels

- **Stewardship Lead:** This person develops the stewardship journey for your donors. They will either produce and deliver stewardship themselves or guide other members of the team and/or volunteer supporters in delivering stewardship. Key responsibilities include:
    » Creating stewardship timelines for follow-up communication post-campaign
    » Identifying best channels and tactics for thanking your supporters
    » Creating copy for thank you messages
    » Delivering upon the stewardship plan

Assign the Right People

When assembling your team, remember that each role requires different skills and depending on the size of your team, certain members might be responsible for multiple roles. This is a tremendous benefit of having a team of 4+ people; the workload is shared between people with a variety of passions and areas where they excel. Remember, the entire team benefits from having people who are organized and enthusiastic!

How you bring people into your team is as important as who you bring in. Ask people directly whether they would be willing to fill a particular position on your team, and let them know up front what the expectations are for the role they might fill. By asking them directly, you let them know that you value them specifically, rather than just anyone. A direct ask also communicates that you have considered their talents and how they would benefit the content creation, marketing, and stewardship processes.

Explain the story and its value if they aren't already aware, as well as your overall goals. Let them know specifically what the role you're asking them to take on entails. Making them aware of the expectations up front minimizes dropouts down the road. Show you respect their time by being clear in their expected commitment.

INSPIRE YOUR TEAM

The team you've built should already be comprised of individuals enthusiastic about the project, but it never hurts to have a good morale boost. Make a plan to:

- Keep the goal front of mind
- Update the team on the project's progress
- Celebrate wins
- Recognize team members

NEXT STEPS

- ☐ Define the roles your team needs & determine who can fill them
- ☐ Ask your team to participate. Document your final team with contact info, notes on their role and your next steps for them
- ☐ Make plans to maintain your team's inspiration

Set Your Goal & Develop a Budget

A realistic fundraising goal can make or break a great campaign. Set a goal too low, and people might not know that there's more good you can do with additional support. Set a goal too high, and you risk overwhelming your audience with the magnitude of your challenge. Neither of these is ideal. In this article, we'll learn how to establish ambitious yet attainable goals, develop a budget, and avoid the potholes that have destined other campaigns for failure.

SMART Goals

It's easy to set pie-in-the-sky goals, but if you want results, clarity is key. If a goal is SMART—specific, measurable, attainable, relevant, and time-bound—it is well defined, within reach, and it makes it easy to focus on the steps needed to achieve success. Let's dig into each of the criterion.

Specific - know exactly what you're trying to achieve.

Measurable - establish milestones and criteria by which you'll know when you've achieved your goal. Most teams measure their success by financial milestones. And those that post their goals and illustrate progress raise 35% more than those that keep the goal hidden.

Attainable - make sure your goal can be reached. Of the campaigns that achieve their goals, 72% raise between $1-10,000. Don't set yourself up for failure (62% fail)!

Relevant - make sure the goal is impactful for your project and is aligned with your mission.

Time-bound - set a timeline with an end date. There's a common misconception that the more time you give people to give, the better. Wrong. There is a spike of activity in the first 3 days and again in the final 3 days of the campaign's life. The valley in between these peaks can take an emotional toll; make it short! A sense of urgency is what gets people off the fence and involved with your project. Set the length of your campaign to 30 days.

Remember, ambiguity is the enemy as you define your goal with clear, concrete milestones. Be as clear and precise as possible.

Costs and Budget

It's easy to determine a goal when there's a set cost that you need to meet in order to bring your project to life. This might look like:

- The cost of travel to an event, accommodations while there, and admission
- A number of opportunities you'd like to be able to provide
- The cost of materials for a building project
- The price for the new piece of equipment you'd like to purchase

A helpful exercise is to sit down and create a budget. As you think about your project, what are all the different components that have expenses?

- Do you have to get to the airport?
- Will you have to ship/mail items to the destination of the competition or presentation?
- How many people are you supporting?
- What are the different materials you'll need to create the thing (tiny home, race car, aquaponics system, etc)?

You don't need fancy templates to create your budget, just a pen and paper or a basic spreadsheet. In one column, enter a description of the expense. In the next column, enter the amount. The more detailed you are, the better idea you'll have about the minimum amount you'll need in order to be successful, as well as an idea about stretch goals that will allow you to achieve more or enhance your efforts.

Another benefit of creating a line-item budget is that it will help illuminate different ways that your supporters can impact your project, based on gift size. Clearly defining several gift sizes with impact examples will empower your audience and put help within their reach, at various giving levels. For example, what (specifically) can a gift of $50 help achieve? What if 5 people give $50? What about a gift of $100? Help people visualize how their small gift can have a huge impact. This directly counters the risk of your audience feeling overwhelmed by the magnitude of what you're trying to achieve. Break your goal into small monetary amounts to show people that they can make an incredible difference. Remember, people want to know exactly how their gift will be used and this gives them that trust-building transparency.

Reach

Now that you have your budget determined, it's time to see if the figure is realistic, given your marketing reach. Keep in mind that 80-90% of the funds that you raise will come directly from the marketing efforts of your team. The bigger your audience, the larger your reach.

Work through this exercise.

1. How much do you need?   **$**   **Focus on the minimum you need to complete your core objectives.**

Pro Tip: Make sure you account for the cost of producing and delivering rewards!

2. Divide that amount by $50:   **This is the number of $50 donations you will need to reach your goal.**

Note: Average crowdfunding donations range from $25 - $80.

3. Divide that number by .25:   **This is the number of people who will need to visit your campaign page.**

Assuming that 25% of the people who are driven to the page will donate an average of $50. Note that actual conversion rates are around 4% for twitter clicks, 10% for Facebook clicks and 50% for personal e-mail appeals to friends and family.

4. Divide that number by .85:   **This the number of people your marketing plan* must drive to your campaign page.**

80 - 90% of the funding a campaign receives is from donors who are driven there by the direct marketing efforts of the campaign team. Only 10 - 20% of donations come from donors who find out about the campaign from other sources ("the crowd").

What was your final number? Between the members of your team, do you have enough contacts to realistically reach your goal?

One way to determine this is to open your social media accounts that you plan to use for outreach, as well as your email account(s), and jot down the following:

- Number of people you plan to send a personalized email
- Number of Facebook friends
- Number of likes on your group/organization's dedicated Facebook page
- Number of Twitter followers

- Number of Instagram followers
- Number of visitors to your blog/website
- Number of Youtube subscribers
- Number of LinkedIn connections

Does the number of people you'll need to reach seem more attainable now that all your channels are mapped out in front of you?
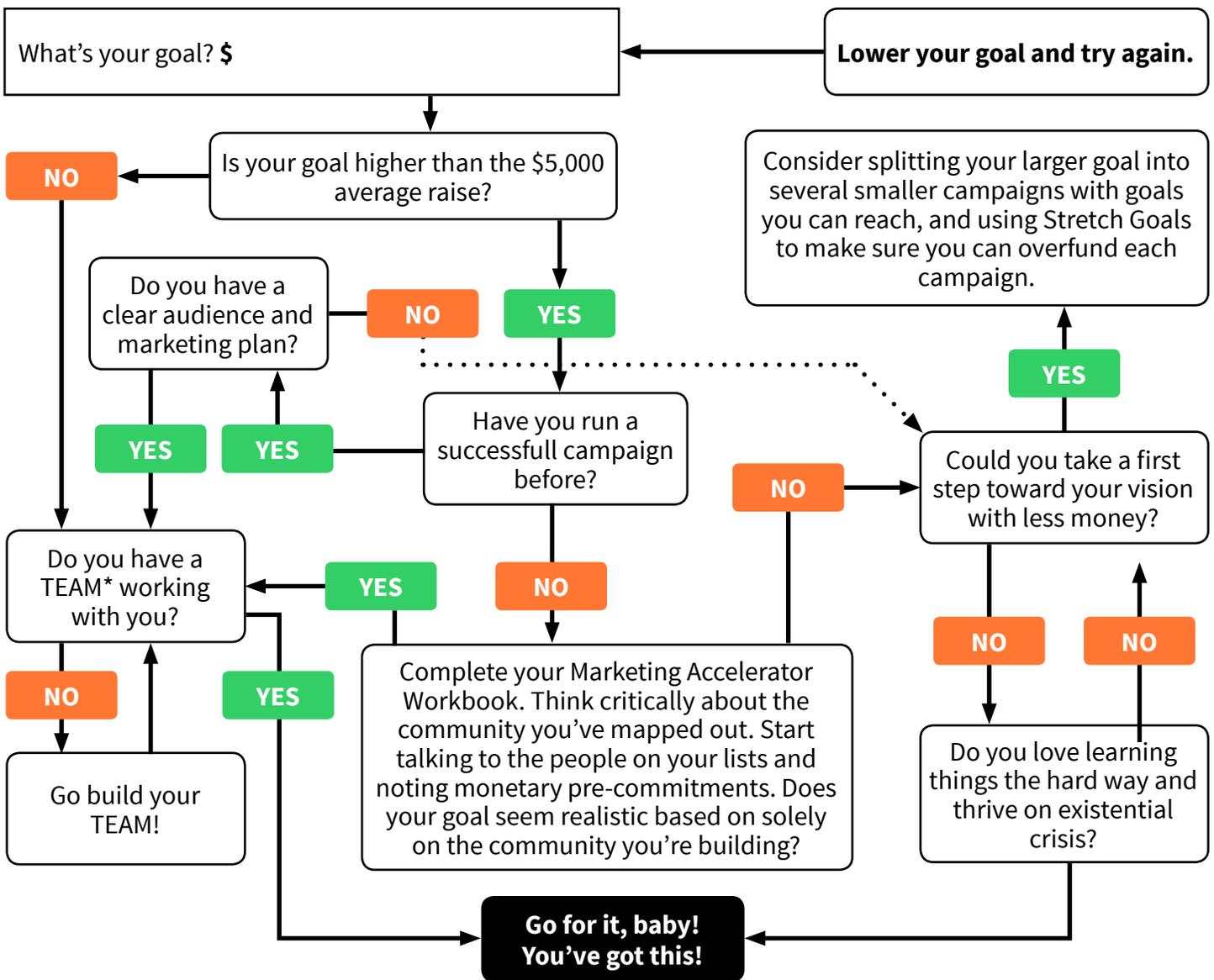
Calculators

If you're still wondering if your goal is realistically attainable, here is a great tool that takes into consideration your team size, amount of time you have to prepare, as well as your various channels of outreach.

Considerations

As you think about your goal, consider the following:

➔ Are you trying to raise more than the average for successful campaigns ($1-10,000)?

➔ Are you working with a team? Teams increase their reach because each member has his/her own audience. The end result is that teams raise 3x more than people flying solo.

➔ Do you have a clear audience and a marketing plan to reach it? Keep in mind that while the use of social media is critical, the conversion rate of a timeline (or other feed style post) is only about 4%. Your time is best spent with personal messages and emails directly to people that know and care about you and your project.

What's your goal? **$**

Lower your goal and try again.

Is your goal higher than the $5,000 average raise?

NO

YES

Consider splitting your larger goal into several smaller campaigns with goals you can reach, and using Stretch Goals to make sure you can overfund each campaign.

Do you have a clear audience and marketing plan?

NO

YES

YES

Have you run a successfull campaign before?

YES

Could you take a first step toward your vision with less money?

NO

Do you have a TEAM* working with you?

YES

NO

NO

YES

NO

Complete your Marketing Accelerator Workbook. Think critically about the community you've mapped out. Start talking to the people on your lists and noting monetary pre-commitments. Does your goal seem realistic based on solely on the community you're building?

Go build your TEAM!

Do you love learning things the hard way and thrive on existential crisis?

NO

Go for it, baby! You've got this!

For some teams, taking an honest assessment of their reach means that that they need to fractionalize their goal. In other words, break the whole goal into multiple smaller, more realistic projects. This might mean taking another look at your budget and determining what you need versus what would be nice to have. Make the need your initial goal and add stretch goals that fund the nice to have items.

Pro Tip: Most campaigns that reach their goal end up rising more.

List the things you **NEED** to have in the next 6 months to continue moving forward with your idea / project / vision:

NEED TO HAVE:

List additional things you **WANT** to have that go beyond your core objectives:

WANT TO HAVE:

Go nuts: List things you **WISH** to have assuming "anything is possible":

WANT TO HAVE:

Now, go back and add estimated $ values into the right column for these items.
Bonus: Note the impact each of these items would have in the world.

- Can you break this Needs, Wants and Wishes into more than one campaign? (Fractional fundraising).
- Your first campaign;s GOAL should cover the main NEED TO HAVE items.
- Create "STRETCH GOALS" to account for your want & wish to have items. Include these in your campaign summary + the impact each will cause.

It's worth mentioning that most groups that achieve their initial goal, go on to raise more than they intended! A powerful approach is to set your initial goal conservitavely (while still covering your bare-bones needs) and intentionally plan stretch goals to release as you overcome each milestone. This will do a few things:

- You'll jump out and show more dramatic success faster (the sooner you get to 30% of your initial goal, the better).

- Your success will demonstrate proof that people trust your team and believe in your project.

- It will give you a great reason to reach out to your supporters with updates. They want to hear about your success!

- You'll have the opportunity to ride the wave of excitement as you crush through your initial goal(s).

Developing a goal takes some planning. You need to determine your budget, make some tough decisions about what's a necessity, plot out your team's marketing reach, and plan for success by establishing stretch goals. This is a place where a little planning can make a world of difference! Be thorough, think SMART, plan with conservative optimism, and you'll set yourself up to exceed your goals!

NEXT STEPS:
☐ Create your line-item budget
☐ Categorize needs vs wants
☐ Determine your team's marketing channels
☐ Plot out the reach of each marketing channel
☐ Define your goal(s)
☐ Assess your goal(s) using the SMART test

Create Your Video & Images

Videos and images are the windows to the soul of your campaign. Descriptive text is important to your initiative's overall success as well, but videography and photography will raise your campaign to another level. According to Non-Profit Source, crowdfunding campaigns with personal videos raise 150% more than those that don't have videos. These elements are the visual story that evoke emotion and ultimately make someone feel compelled to support your cause.

With video and image content, you don't need a Hollywood-level set or budget for a professional photographer. What matters most is how captivating the content is, and if it adequately demonstrates how important your cause is to the community. Remember this mantra: authentic is more important than polished. People will want to give to your cause because they feel connected to the story, not because you used a high-end video camera. In some cases, an overly-produced video can distract from the story itself if not done properly. So, let's dive into some tips and best practices when it comes to bringing your initiative alive with visual content.

Crafting Your Video

As our society becomes increasingly busy and attention spans continue to shorten, video is more important than ever in delivering the emotion and call to action for your campaign in a short amount of time. Just think - if a picture is worth a thousand words, imagine what a video can do for the success of your initiative.

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Best Practices for Video
Don't let a lack of experience in film intimidate you! A powerful, meaningful video can easily be created if you keep a few things in mind:

Know the Basics
These simple tips will help you maintain a base level of quality, regardless of the equipment you plan to use:

- If possible, use a tripod. A steady hand will work if you don't have other options, but a shaky camera can be a distraction from the story being told.

- Make sure people are speaking clearly toward the camera - you want your message heard!

- Be mindful of good lighting (more to come on this later in the article).

- Keep an ear out for possible audio distractions. It may not be noticeable to the naked ear, but unwanted background noise such as a car driving by, the hum of an air conditioning unit, people talking in the background, dogs barking, etc, can be unwanted distractions. Make sure your surroundings are as quiet as possible before filming so that the focus stays on the people talking in the video.

Keep it Short and Sweet
Get it out of your head that an in-depth, full feature video is the way to go. Ideally, your video should be 2-4 minutes in length, max, according to an article from Videopixie. You want to be thorough, but concise. If you are having trouble editing down the length of time, remember that the video should appeal to the viewer's emotion, while the nitty gritty details can be reserved for the text.

Cut to the Chase

Since the video needs to be short in length, use screen time wisely. In your video, you need to clearly communicate the following:

Who you are - helps build the level of trust.
What you are doing - explains what potential donors will be supporting.
Why you are doing it - emphasizes the importance of this cause for the betterment of the community.
How people should get involved - "The Ask" - specifically states how viewers can help support your cause. Be direct. For example, ask people to click donate and give or share directly with three people instead of just generally stating, "please support us…"

Clear, straightforward information will give the viewer everything they need to know in a short amount of time. Write a script and/or map out the flow of the video to help give you a better idea for the types of supporting footage you will need to capture.

End on a Strong Note

At the end of the video, the viewer should know exactly what they can do to help your cause (and feel compelled to do so). Make that ask and let them know exactly how they can make a difference.

Express Gratitude

Assume people watching are going to donate to your cause - and remember to say thanks!

Watch the Final Version with your Eyes Closed

That's right! It's easy to get wrapped up in the great footage you captured, but do the words make sense and tell the story when the images are removed? Would someone who is visually impaired still be able to follow along with the story and know how to help? These are important questions to answer in order to ensure that your video is inclusive and has a great flow.

Examples of Crowdfunding/Fundraising/Appeal Videos that Tell a Strong Story:

→ https://vimeo.com/28104222
→ https://vimeo.com/29535660
→ https://www.youtube.com/watch?time_continue=69&v=XYtAxeKb2ak
→ https://vimeo.com/101359011
→ https://www.youtube.com/watch?v=3iIkOi3srLo
→ https://www.youtube.com/watch?time_continue=73&v=tBGG3oileCI
→ https://www.whattookyousolong.org/video-portfolio/2018/3/15/kadija

Video Types to Consider

Story Video - This is the main video on your story page, and gives the full view of your cause.

Teaser Video - This is a short snippet to get people excited about your campaign, but does not provide the full story. It should pique interest so that the viewer is eager to learn more. The best part is that this can usually be done by repurposing a small piece of the Initiative Video, which minimizes the time needed to create entirely new content from scratch. Teaser videos are best utilized as part of promotional outreach via email or social media. Additionally, they can also be added to a "coming soon" page that displays before you officially launch a giving day as well.

Update Video - Video is a great tool for providing updates to both potential and existing donors throughout the lifecycle of your initiative. This can be as simple as a person talking into the camera with the latest news, or action shots of work currently being done by your team to make the initiative a reality. Update videos can be very short and fairly informal, but will still keep your audience engaged and connected to the cause. Successful teams usually update their audience at least 4 times between the launch and close of their campaign.

Stewardship Video - Consider visual storytelling for updates and stewardship as well. Continue keeping your supporters connected so that they can continue their relationship with the story. Was there a specific event that resulted in funds from the campaign? Take some footage and send in a personalized email update. Was a specific group of people impacted by the support? Coordinate with them to create a simple thank-you video for all donors. Additionally, make sure your video is focused on how donors helped your cause, and be mindful of expressing gratitude more than once in your video!

Here is an example of a strong thank you video:
https://www.youtube.com/watch?time_continue=18&v=7DQBgIrpUQE

Editing Your Video
When filming and editing your video, the main goal to keep in mind is to you want to draw attention and hold attention. Well, how do you do that?

Edit to Captivate Your Audience
Quick shots that change after a few seconds will create a sense of action and keep the viewers' attention. And note that it's best to get more footage than you need so that you can edit down versus having to use footage that is less than ideal because you're out of options..

Know Your Tone
Humans are wired to respond to non-verbal queues as a way to pick up the tone of a situation. With this in mind, it's important to note that lighting and music will play a big role in the emotions your video invokes for viewers. Determine the feeling you want people to have while watching, and use light and music to support that idea. For example, if you want people to feel happy, you'll want jovial, upbeat music and bright lighting. In contrast, if you want people to feel the heaviness of a cause, shadowing and slow, somber tunes will help set the scene. However, remember to be mindful of copyright laws, and double-check that the the video adheres to licensing regulations.

Diversify Your B-Roll
By definition, b-roll is the supplemental footage that's cut in with the main video shots (think, video sequences of birds flying around while a person is being interviewed about nature conservation). B--roll will add excitement and vibrancy to your video.

Utilize Video Editing Software
A wide variety of video editing tools are available, ranging from fairly basic to extremely complex. Even if you choose the most complex option, remember that the focus should not be to utilize the flashiest bells and whistles, but instead to edit from the standpoint of most effectively telling your story.

With these recommendations, you'll be set to create an Initiative Video that will captivate and inspire your audience!

Photos/Images

Though it's important to focus on creating a strong video, don't forget about your photos! They are equally important in showing the needs and impact of your initiative and should be used within your story description, updates, outreach, and stewardship. There are two options when it comes to obtaining your images: use existing images or take them yourself.

Using existing images can be a double-edged sword. On the plus side, using stock images can be a timesave since you don't have curate your own shots. The good news is that if your organization has a database of image, they probably already adhere to your brand standards and are available for you to use. On the other side, you might have to pay for the images you want and you'll need to be mindful for copyright protected works.

If you're a do-it-yourself type, here are the steps you'll want to take for creating a strong visual story with photography. Regardless of whether you choose to take photos yourself or use existing images, there are a few items to keep on your radar.

Plan Your Shots
Of course, you can't always predict the setting for your photos, but it helps to be prepared for several outcomes. If your photoshoot is staged, plan the various shots you'll want to take that best show the audience why you need support. If the photos won't be staged, show up to the scene early and get comfortable with the surroundings. Think about time of day, location, weather (if applicable) and scenery so that you feel prepared.

Think about how you would fully tell the story of your initiative if you weren't allowed to use any text. These are the photos that will inspire your potential supporters.

When planning, also consider the types of photos needed and how they will be used throughout your initiative. Will they be specifically for social media? Used for updates? Sent with a note of thanks after the initiative ends? Having this information in advance will help make your content more robust.

Be Present
With video, you can set a camera to record and then review later, catching special little moments you may have missed with the naked eye while filming. You are not afforded the same luxury with photos - you must be present and aware so that you are ready to quickly take a photo when the right moment happens. Be alert and feel free to snap as many shots as needed - the more to choose from, the better!

Practice Makes Perfect
As previously mentioned, you do not need to be an expert photographer to create strong imagery. However, it doesn't hurt to practice so you feel confident when the moment arrives. For example you, can play around with different angles, experiment with the placement of the sun in your photo, test your camera shutter speed, etc.

Mix Up Your Angles
Think beyond the straight shots! Change your levels, get close-ups and wide shots, and move around your settings. A variety of shots helps keep the content interesting and can be repurposed for both your campaign and any future needs of your institution.

Remember Your Lighting
Similarly to video, light, and conversely, shadows, play a big role in the emotions of an image. Be mindful of how you want someone to feel when they explore your initiative, and use lighting to your advantage.

Regardless of whether you choose to take photos yourself or use existing images, there are a few additional items to keep on your radar:

Utilize Editing Tools

Many smartphones now have basic editing capabilities to zoom, rotate, adjust lighting, etc. There are also plenty of free or low-cost options online, so use them to your advantage! Fitlers, color adjustments and other small tweaks can have a big impact (there's a reason Instagram provides so many options!).

Don't Forget Captions

Captions are short, usually one-line, titles or explanations for a photo, and they can be helpful in making sure that your site visitors understand what you want them to really see in a photo. Captions are also useful when using photos for social media purposes.

Always Keep Emotion Top of Mind

Whether or not you are the person taking the photos, remember to choose the images that exude the strongest emotions for your initiative. For example, say you have an initiative that's helping fund a collaboration event. Below are your two visual options:

In the top photo, you get an overall view of the collaboration happening. While it's not a bad photo, it doesn't invoke any emotion - you almost feel like an outsider looking into an event.

In the second photo, you can feel the happiness of the two men who are working on a successful project. You clearly see their smiles, and you can sense the positive energy exuding from the photo. Between the two options, the second photo is the obvious choice. Remember that *emotion is key, and it is what will make people support your cause.*

Now you have the information needed to create meaningingful photos and videos! You've got this. So lights, camera, fundraise!

NEXT STEPS:
- ☐ Determine the photos and videos you want for the various lifecycle stages of your initiative. Remember, you'll need to consider:
  - ☐ Promotional outreach (email, social media, any additional websites)
  - ☐ Story
  - ☐ Updates
  - ☐ Stewardship
- ☐ Plan your shots for video and photo, keeping emotion top of mind.
  - ☐ Determine your tone
  - ☐ Consider your lighting
  - ☐ Pick your music wisely
  - ☐ Collect a diverse set of shots/footage
- ☐ Research the software/editing tools you plan to use for helping bring your video to life.
- ☐ Practice! Get comfortable with the camera(s) you plan to use.
- ☐ Be present in the moment so that you capture the special moments.
- ☐ Schedule the release times for your video and/or photos, so that you can develop a timeline for editing and final content.
- ☐ Write captions/descriptions as necessary.
- ☐ Have fun! Enjoy the art of visual storytelling.

Video Resources

Stock Music
http://freemusicarchive.org/
https://www.freestockmusic.com/
https://motionarray.com/browse/stock-music

Sound Effects
https://freesound.org/browse/tags/sound-effects/
https://www.premiumbeat.com/blog/120-free-sound-effects/
http://soundbible.com/

Voice-Overs
https://www.animaker.com/voice
https://animoto.com/

Stock Images and Video
https://pixabay.com/
https://www.istockphoto.com/
https://picsart.com/
https://stock.adobe.com/
https://www.pond5.com/
https://allthefreestock.com/
https://www.gettyimages.com/

Sound Editing
https://www.audacityteam.org/
https://www.ocenaudio.com/
https://wav.hya.io/#/fx
https://audiotrimmer.com/

Video Editing
https://www.nchsoftware.com/videopad/
http://www.videosoftdev.com/free-video-editor?AVGAFFILIATE=3305
https://www.apple.com/imovie/
http://www.videosoftdev.com/
https://www.openshot.org/

Photo Resources

Image Editing
https://museworks.co/piclab/
https://pixlr.com/mobile/
https://play.google.com/store/apps/details?id=com.niksoftware.snapseed&hl=en_US
https://www.befunky.com/
https://www.pizap.com/
https://museworks.co/piclab/
https://www.photoshop.com/products/photoshopexpress
https://vsco.co/

Tell Your Story

People are hardwired for stories. From the crib, our parents read to soothe us, even before we can understand the words. As young children we were captivated by storytime, spending countless hours lost in the well-worn pages of our favorite tales. Even though we knew them by heart, we were enraptured by their telling. This doesn't change as adults. Think of how many hours you've spent watching tv, movies, or reading a novel this week. Even when we're asleep, our brains grip us with stories (dreams)! We can't help but engage with the enchanting, scary, funny, and tragic tales.

Let's look at the introduction of two different stories that confront the problem of homelessness.

"I was released from prison after eight and a half years, but it's not how you start out at the gate, it's how you finish. I remember there were times I would be on the train and I'd be so embarrassed because I was dirty. And I would look like I had been there the last 5 days and you know people are working and they're fresh and clean and everything. And I used to just look for a hole to crawl into."

("Harry Dickerson", n.d.)

"We are a small group based in Milton Keynes who aim to improve the hygiene of citizens sleeping rough. We will do this by raising money to create 'care packages" which will include basic essentials such as sanitary pads, toothbrushes, wet wipes exc that many go without. By sponsoring our charity you will be giving your homeless community the gift of hygiene, cleanliness and give them their pride back."

("Team Eleven", 2017)

Which story makes you want to read more? Which do you feel is connecting you with a living, breathing, person? Which do you think was more successful?

At its core, crowdfunding is **storytelling X sharing**. It's important to remember that you're not panhandling or mooching! You're an expert that knows this problem/challenge better than virtually everyone, and you're inviting others into an adventure to make an impact WITH you. You're not begging for bucks, you're changing the world, and you're doing it by telling a story.

Start with a Single Character
It's easy to fall into the trap of wanting to show the magnitude of the problem. There are thousands suffering, hundreds of people that will benefit each year, huge numbers of people that will gain access to something important because of this project. The bigger the problem, the more people will be touched by your project and the more likely they'll be to get involved, right? WRONG.

People are easily overwhelmed when confronted with large problems. We have a difficult time wrapping our minds around the enormity of issues, which leads to a mental response called psychic numbing. Psychic numbing is what allows people like rescue workers to go to work day after day where they encounter the unthinkable. It also causes people to mentally retreat when they think their personal effort won't have an impact. In this case, this adaptive response leads to inaction.

A powerful study by Paul Slovic in 2014 demonstrates that people's compassion starts to diminish when people are presented with as few as two victims instead of one. It's as simple as that! This means that it's crucial to tell your story from the perspective of a *single character*.

How?
- If you're raising funds that will benefit a group, pick *one recipient* and tell the story from their perspective.
- If funds are going to a team, pick *one player/member* and tell their story.
- If you're trying to fund a piece of equipment, tell the story from *one person* that will benefit from its use.

Types of Narratives
Now that you've picked the character for your story, it's time to choose a narrative. These four storylines have held up to the test of time. Your story should fit into one of these frames:

The Hero's Journey
This storyline has captivated the masses in the Wizard of Oz, Star Wars, and Lord of the Rings. It's one of the most successful storylines in Hollywood, and for good reason. As a member of the audience, we get to go on a quest along with the characters! Are you at an impasse and need support to overcome an obstacle? Are you a group trying to get to an event or acquire a piece of equipment? The key with this narrative is to make your audience the hero. Tell them about how their support can help take the character to the next stage in their journey. Here's an [example]() of this storyline in use.

Overcoming the Monster
This is your classic James Bond narrative. The hero has to defeat an enemy that's threatening them or their community.The first step is to define the monster. What makes it so terrible? Is your group fighting against oppression? Will funds help people break away from abusive situations? How will the lives of people be better if the enemy is defeated? Once you've depicted the villain, make your network the hero that is going to help slay the enemy! Here's an [example]() of this storyline in use.

Rags to Riches/Rebirth
We see this in Mad Men and Cinderella. The main character starts out with nothing (or maybe loses it all) and ultimately gains wealth, power, status, love, you name it. There's a transformation that takes place. Is your project or cause prompted by the life transformation of a team member? Are you looking to raise funds for a project or organization that helps others transform their lives? If so, this might be a good storyline for you. Help your audience see themselves as the hero that can help bring about this renewal. Here's an [example]() of this storyline in use.

Tragedy
This is the narrative to use amidst natural disasters or times when emergency support is needed because of an accident. This is for an immediate crisis. Illustrate the good that will come of support. Will funds go to immediate tangible items like water, food, shelter, or clothing? Will funds help offset medical bills? Is there a memorial fund being established for someone that passed away? If so, this might be the storyline for your project. Be careful not to dwell in trenches, but focus on the positive impact that can be made with support and empower your network to be the hero that help illuminate the darkness. Here's an [example]() of this storyline in use.

Follow the formula
Your description should read like a story and provide the basic details your supporters will want to know before making a gift. Use this formula to help ensure you're telling an exciting tale, answering questions, and inspiring people to act!

- Define a character. Who's involved? What's their backstory? What are their hopes and dreams?

- Present conflict. What's standing in the way of their dreams? What's the problem? Introduce the monster/villain.

- Inspire action. "Together, we can overcome [the conflict] and help [the character] do x, y, z"

- Make the ask. Tell the audience what do do. "Donate now and reach out to three other people you know are also passionate about [topic of project]."

- Show the impact. Tell the audience what impact is made in the world because of their support. "Because of your support, [the character] will be able to…"

- Leave them wanting more. Let the audience know this is an ongoing story and that they should keep checking back for updates

Tips

- Limit your story to between 300-500 words. Stories should be immersive, yet brief. You want to pique the supporter's compassion and inspire them to get involved. Use updates and social media to keep the story going with details that didn't make the final cut for the story page.
- Reread the narratives and notice that the objective of each storyline is to make your audience the hero. You're providing an opportunity for ordinary people to make an incredible impact and while they're doing it through your team/organization, it's not about you. Get out of the way and focus on the relationship between your audience and your *single character*, not facts or information about the whole organization.
- Fractionalize your goal. Tell people what a gift of $25, $50, or $100 will do to make an impact. Be specific. Be clear about your plan for using the gifts and provide updates to your supporters as milestones are reached and funds are spent. There are two questions that should be answered in every story:
    » Why do gifts matter?
    » How will the funds be used?
- Don't launch your story without clear, definable, tangible answers to those questions.
- Tell your audience exactly where to click to donate and how to share your story.
- Make the Ask. You've done a great job of inspiring your audience, now personally invite them to participate. By asking people to donate, share, and like your messages, you're letting them know exactly how they can become the hero in your story.
- Every good story has conflict. Create a villain.
- Inspire Action! Use language like "with YOUR help…" and "because of YOU…"
- Don't forget images! Children like picture books and as adults we gravitate towards imagery, charts, and other visual representations of information.
- Continue the story by reminding people to check back for updates. The average successful campaign updates their audience at least 4 times during the life the campaign. Campaigns with regular updates raise 126% more than those without. Think of milestones and new detail to keep your audience involved.
- Thank your donors lavishly and keep them up to date on the project; they want to hear that there was a happy ending!

There are some stories that stand the test of time while others are easily forgotten. In a veritable flurry of digital noise, use your authentic, personal, relatable stories to rise above the din so that you can bring your passion, compassion, excitement and change to a world that needs more happiness.

NEXT STEPS:
- ☐ Find 3-5 crowdfunding projects that tell similar stories to yours and use them for inspiration. Were they successful? What did you like? How did they compel people to act?
- ☐ Create your title. It should contain:
    - ☐ About 7 words
    - ☐ An action verb (send, move, save, rally, etc)
    - ☐ Mention of an event, conference, or competition (if applicable)
    - ☐ A name (this could be your recipient, people like someone who has benefited, or a team/group name)
    - ☐ A hint at your greater story
- ☐ Name your character. You may or may not use this name in your story, but it will help you define exactly who is a focus of your story.
- ☐ Determine your narrative type.
- ☐ Answer the following questions in granular detail:
    - ☐ Why do gifts matter?
    - ☐ How will the funds be used?
- ☐ Draft your story. Use the above formula as a guide and keep it to 300-500 words.
- ☐ Decide what types of images will support your story.

Great Work!

Congratulations, you've made it to the end! We've covered a lot of ground in the pages of this workbook!

Together we learned:

- Strategic building of your story management team.

- How to develop appropriate goals and a budget.

- Tools for creating compelling video and images.

- The power of storytelling and models for different narrative types.

You've learned how to plan in order to be successful. You can identify the people who need to be on your team and what responsibilities need to be covered. You have the tools to create specific, measurable, attainable, timely goals. You have the resources to make a killer video and compelling content.

Finally, you're aware that we're hardwired to tell and hear stories, know how to tell yours in a way that's compelling, trust-instilling, and are ready to ask for the support you need.

You're ready!

The Story Marketing Workbook

Pre-mote Your Story

Promotion starts well before your campaign officially launches. The "pre-motion," or promotion ahead of the public launch date, is some of the most crucial work you'll do to ensure your campaign reaches its goal. There's a common fallacy that "If you build it, they will fund." In other words, if you create a story and launch it into cyberspace, people will find it and give.

That's just not the case.

The majority of the funds you receive (80-90%) will be from your team's effort in personally driving people to your story and inviting them to join in the adventure by giving.

It's natural human tendency to support something which is already popular among the masses. That's why you'll want to get your best supporters on board early with a gift so that by the time your campaign is open to the greater public there's a clear mass of support. Campaigns starting at or near zero support run a huge risk of falling flat when promotion to your wider audience begins.

In a study in which researches influenced the rates of initial success for individuals in a variety of pursuits, they consistently found that early success produced significant improvements in subsequent rates of success compared with the control group. Put simply, success begets success.

We know that the 30% mark is a tipping point in donor psychology. People recognize that this is no longer a fledgling campaign, but a story with momentum. The faster a story can get to the 30% mark, the better. You should aim to reach 30% of your goal before your campaign's public launch date.

Champion Promotion
Gather your group of promoters, or campaign "champions." You'll want a team around you spreading the word about your campaign to cast a wide net.

When it boils down, crowdfunding is just **storytelling x sharing**. One individual can reach many. When many individuals reach out to many, the extent is great. This is the multiplying effect of crowdfunding.

Individuals

That means you'll want as many champions as possible - the more the better!

List out your potential champions:
- Who is already a part of your core campaign team?
- Who do you know that is already a strong supporter of your cause?
- Who has a strong influence, a large network?

Find those that with the willingness and the capacity to reach out to their own networks. Consider collaborating with previous campaigns or offices within your organization to identify and recruit strong champions.

Connect with your champions early and often. Personally invite them to be a part of your campaign promotion team and be prepared to explain how their promotional efforts will make a difference for the campaign.

Once you have your Champions on board, they'll need guidance. Just because they're up for championing the cause doesn't mean they know how to best help with your promotion!

Equip them with:
- An overview of how they fit in to promotion efforts
- Language to use
- A timeline for when to reach out to their networks
- Goals for their personal outreach

We'll cover these toolkits in depth in the third section.

Champions are the key to your success. Let them know it! Don't shy away from why you're reaching out to them specifically: they're on your VIP list for a reason after all. Like any supporter, make the feel valued.

Campaign Team Promotion
In addition to champion outreach, your campaign team should be reaching your broad audience of potential supporters.

Think: who is likely to donate to the campaign? Get these supporters on board early with clear calls to give. List out their Names, Relationship and Contact Info, then evaluate and track their estimated donation. Reconcile the total with your campaign goal. These anticipated donors (those you're reasonably confident will support the opportunity) should make up at least 30% of your goal total. Keep in mind that not everyone will make their donation during the pre-motion period, but again, the closer you can get to 30% before the official, public launch, the better.

When determining which team members are reaching out to potential supporters, be aware (and try to avoid) overlap. While different outreach from multiple people might appear encouraging, showing that your team is enthusiastic about success, it runs the risk of appearing sloppy, like you're unaware of who is contacting whom. It can be overwhelming. With the exception of a social media post, potential supporters should not receive a boilerplate message from multiple people on the team.

Consider which individuals on your campaign list could be divvied out to champion outreach as well. Genuine outreach from a strong supporter of your cause can tip the scales.

Pre-motion Theme, Channels & Timeline
Communications should be personal. This communication, like all promotion, is based on trust and sincere appreciation for the supporter's involvement. While it may be scripted, outreach should feel like a friend or personal connection is reaching out for help.

Think about how you and your team of champions communicate with your networks already. Build your pre-motion plans with this authentic communication in mind. Incorporate the following channels, always including or mentioning the link to your campaign:

- Social media
    - » Reach the greatest network through public posts, outlining the cause and why it is important to you to support it.
    - » Direct message connections to make messages personal and convey to the individual how important they are
    - » Be persistent in messaging to show the importance of the cause to you
    - » Use visuals to tell your story **Link to visual content section**
- Email
    - » Reach a wide audience while providing detailed information about your campaign
    - » Personalize outreach to convey that you think it's important that the individual you're reaching supports the cause
- Mail
    - » Send a letter or postcard to potential supporters that may not check digital communications as often, directing them to go online to learn about and support your story
    - » Hand write your messages to make the recipient feel valued
- Word of mouth
    - » Take every chance to speak about your campaign. Convey your passion for the cause. Present at events or club meetings, and mention your campaign when catching up with friends and relatives.
    - » Don't save your asks of support for digital messages only - an in-person ask is powerful!

To ensure you reach your goal, focus your promotional energy on the pre-motion period of your campaign. Get your team on board early and craft messages ahead of time to make it easy to act.

In the upcoming sections we'll cover developing a pre-motion calendar and organizing your messaging.

NEXT STEPS
- ¬ Develop your pre-motion schedule >>
- ¬ Develop your communication toolkits >>
- ¬ Create a list of champions
- ¬ Recruit your champions
    - ¬ Discuss the importance of pre-motion
    - ¬ Equip them with toolkits
- ¬ Conduct passionate pre-motion!

Develop Your Asks

Having a clear call to action helps direct your audience to the best way to support your cause.

There are different types of asks that you'll need for different parties that are affiliated with your project.

As a Team Leader, you'll have asks directed to your team members that are very different from the asks that you'll have for your audience of potential supporters. Let's look at your different partners and the asks that are appropriate for each group.

Team Members

These are the people actively working with you to prepare and launch this project.

Common asks:

- Give - The 30% Rule for crowdfunding states that if a project reaches 30% of its goal, it's likely to succeed in reaching its full goal and the faster you get there, the better! There's a tipping point in supporter psychology at the 30% mark that illustrates trust and success, making others more likely to get involved. Dollar value aside, just seeing people already on the bandwagon also exhibits social proof that your project has traction. Remember, gifts of any amount are valuable!

- Share - Remember, 80-90% of the funds your team raises will be as a result of the direct outreach from the team. Team members should follow the outreach schedule (pre launch, updates during the life of the fundraising period, and stewardship) created by the team. This could look like email outreach, posting on social media channels, calling people, or even live visits to people in the nearby community.

- Create a personal appeal - The story your team is telling is important, it's grounding, and it spreads your holistic message. That said, each member's personal network is most interested in why it's important to their friend, colleague, family member, etc. Each member should create a short (30 second) personal appeal video about *why they, personally* are so passionate about this project.

- Follow the Schedule - An outreach calendar and a toolkit of pre-created email and social media pre-motion, updates, announcements, and thanks will help insure that all hands are on deck with the right messages that the right times. If you're looking for guidance, check out the section on outreach calendars.

Community

These are businesses or individuals in the community that can help support your cause or incentivize the gifts of others.

Common asks:
- Give
    - » Match gift - this is a gift that can be secured early and used to increase the support of others. For example, if a member/group in the community commits to a $1,000 gift, it can leveraged as a match so that a gift of $20 effectively turns into a gift of $40. You can make this a 1:1 (a gift of $10 is matched with an additional $10), 2:1 (a gift of $10 is matched with an additional $20), etc and is in effect until the match gift is fully utilized.
    - » Challenge/milestone gift - this is another gift that's secured early and is awarded once a milestone is reached. For example, if the campaign is supported by 50 people, a gift of $1,000 is made to the project by the community member/group.
- Support for physical event - If you plan to have a launch party or closing celebration, a local establishment might provide event space, food, beverages, etc.
- Rewards - If your project supports rewards, local businesses can donate items like their establishment's hats, t-shirts, mugs, koozies, gift cards, etc that can be claimed in exchange for a gift. If your project doesn't support rewards, these items can be a part of a random drawing for those that give to the campaign.
- Promotion - If you have printed material like flyers, posters, etc, the greater community can help by posting in their windows/message boards, providing word of mouth, and using their social media channels to broadcast to their networks.

Supporters

These people are made up of the contacts that you have within your team's outreach lists, your social network contacts, friends, family, colleagues, etc.

Common asks:
- Give - Make sure you tell people what a gift of $x amount will do, and make a direct ask for people to give that amount. You can always say that gifts of any size matter and are appreciated, but if you're looking for a gift of $50, ask for it.
- Share - Sharing can be a great way of showing support either alongside or in lieu of a financial gift (if monetary support isn't possible).
    - » Post to their Social Media channels - remember that a post on a social media feed has a conversion rate of about 4% (not great), but extending that reach is still helpful. Those 4%s add up and you never know who's eyes will come across the message.
    - » Share directly with 3 friends - a personal connection to other people that are passionate about this area/field/cause/problem/solution is even better!
- Stewardship - Remember, the story doesn't end with the monetary transaction. People will want to hear about what happens after the fundraising period ends! Your supporters might be so touched or compelled by your project to want to be involved in additional ways, and helping write thank-you notes, making calls, and thanking through social media channels might be a great additional step.
- Other - There are other, creative ways that people can be supportive. If your team is building something and supplies or a connection with a retailer would make a huge difference, make the ask! If donations of food, clothing, books, or games would get you closer to your goal, ask for them! These asks for creative support are great for updates and reasons to reach out to your audience on social media than extend outside of a monetary gift. Even better, outside-the-box requests draw greater attention because of their uniqueness, and sometimes just capturing attention is the hardest part!

You are surrounded by an incredible network of people from team members to friends and family, and even the greater business community. Remember that people want to see your project succeed and work to find the ways that these groups are uniquely suited to provide support. Get creative and make that ask!

NEXT STEPS:
- ¬ Make an internal commitment that each team member will make a gift to the project.
- ¬ Consider who is in your Outreach Support network and ask them for a verbal commitment to be involved in posting.
- ¬ Each team member create a 30 second personal appeal video.
- ¬ Determine 3 Community groups to pursue for support and identify the type of support you're looking to receive.
- ¬ Evaluate if there are other creative ways that your network can be supportive.

Create Your Toolkits

You've recruited champions to help you promote your story and now they need your guidance. Let's cover how to prepare a toolkit to organize your messaging for every champion to easily take action.

Your job is to make it friction-free for champions to reach out to their connections with the right language at the right time. They have the will and the communication channels (social, email etc), and now the toolkit will be their guiding light. Providing a clear plan conveys that there is a community of people on board to promote alongside them.

For you, providing a toolkit for champions to work from gives you control over how and where the campaign is messaged. You can guide which channels champions should use and when they should be reaching out. Social media and email are the most effective ways to reach a wide audience.

A general toolkit outline would look like:
1. Overview of Campaign
   a. Why you are fundraising for the campaign
   b. What the donations support
   c. Key dates, like soft launch, official campaign start and end, primary marketing pushes
   d. Contact info for questions

2. Your role as a champion
   a. The value of your promotion
   b. How to use this toolkit
   c. Any goals you have for them related to frequency or number of outreach actions. Giving specific numbers will make it clear to champions what is expected and will make them more likely to reach out.

3. Social Media Posts (by channel: Facebook, Twitter, Instagram and more)
   a. Before launch
   b. During live campaign
   c. After campaign ends

4. Emails
   a. Before launch
   b. During live campaign
   c. After campaign ends

5. Assets
   a. Photos and/or videos to post with text
   b. Additional links or resources related to the campaign

In communicating across platforms, keep the key essentials of your initiative in mind—the basic rundown, the Call to Action, the ask—but adjust the copy and content for the channel you're . Include hashtags and links in every post and email - make it easy for donors to get directly to your campaign from copied & pasted messages.

Medium	Content	Length	Imagery
Facebook	Switch it up for frequent posts. Asks, thanks, stories, and updates make for a varied and engaging feed. Thank donors and volunteers by name when possible.	Longer than Instagram or Twitter, shorter than email or mail. You have some freedom here, but you don't want your message doesn't get cut off on people's timelines. Keep it concise, but include details where you can.	Videos and images are reliable attention-getters, boosting interaction and donations. Aim for a 30-90 second video, or series of videos. Include media as much as possible
Twitter	Share a blend of asks, articles, shoutouts, thanks, and stories with snappy attention-getting messages. Links and hashtags for days. Thank people specifically.	No room to waste words! This platform keeps your message quick by default, so make it count. Short tweets (around 100 characters) see the most engagement.	Have fun with videos and pictures. They'll help you stand out in people's feeds and can share information that won't fit in the text.
Instagram	A picture's worth a thousand words. Your caption should share your website and some details about your initiative, but make sure your picture doesn't rely on it completely.	Keep captions on most of your posts close to the length of a tweet. The sweet spot of hashtags falls around 5-10, with 9 seeing the maximum engagement per post. Other than your personalized hashtag and #GivingTuesday, mix them up to avoid shadow banning putting your visibility at risk.	Since this is the basis of Instagram, you'll obviously have pictures or videos in all of your posts. Keep them engaging and varied. Your whole feed shouldn't look the same.
Email	Establish camaraderie, especially if your segmented list gives you enough info to personalize a few lines in different versions. Greet the recipient with familiarity, share the story and link to a source with more detail, explain the goal and impact of this time-driven campaign, and round it out with the Call to Action and links for additional information.	You should only need a few short paragraphs to get your point across. There's plenty of space to include additional resources, like your website, video, and social media, so use some of this space to ground the email within all of the other work happening for this initiative.	Include a video in a handful of your emails and your logo or graphic and a picture or two in all of them. Just be sure to test it so that any visual-heavy formatting isn't lost or changed in coding.
Mail	For donors who may rely more on mail than the internet, provide more thorough detail in postal communication. Explain Giving Tuesday and your initiative clearly with a straightforward ask. Personalize anything bigger than a postcard with the recipient's name. Include a Save the Date.	Aim for a postcard to a broader audience and a 1-page letter to a more targeted audience. Keep records of who your mail-in donors are and appeal more heavily to them.	Include your campaign logo or graphic always, and possibly one or several powerful photos. Handwriting, even just a signature, is a nice touch if it's manageable with the size of your mailing.

Consider your toolkits as a guide for promoters. Empower folks to use their own voice where appropriate, and encourage them to use their own creativity to come up with new ideas. Above all, stress that communications should be personal. Some will follow your suggestions to a T, and others will take it upon themselves to tweak to their own language. Foster their enthusiasm to use their own voice.

Be sure to check in with your champions throughout the promotion schedule. Remind your promoters that it can take multiple asks before a supporter is ready to get involved. Persistence is key. Assume folks want to support the project: You are fundraising for a good cause, aren't you? Then have no fear about asking others to make an impact!

Include a link to your toolkit on your campaign or in follow-up communications with supporters - you never know who might be your cause's next champion!
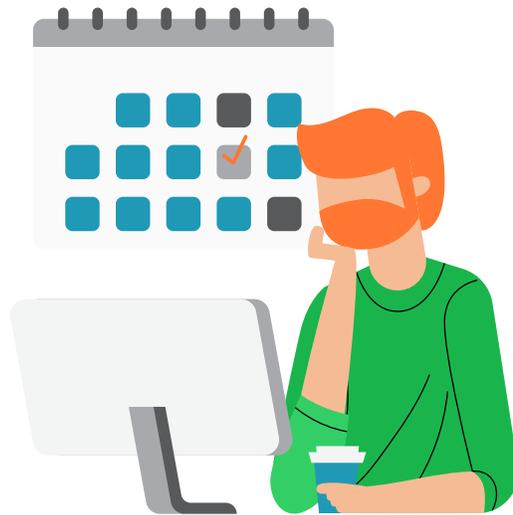
Check out these deeper dives to toolkits, including example language:

Toolkits - Email
Toolkits - Social Media

NEXT STEPS:
 ¬ Craft Your Toolkits
 ¬ Equip Your Champions
 ¬ Develop a schedule to check in with Champions

Build Your Outreach Calendar

You've done so much to prepare for your campaign! Now, time to craft your communications calendar to organize your pre-motion and update schedule.

You should map out your outreach in its entirety and pre-formulate as much of the messaging as possible. As the launch date approaches and you enter your pre-motion period, you'll want to be able to simply pull the trigger on communications. You'll need persistent outreach to create engagement and momentum around your story.

Before Launch
Use this time to inform supporters that the story is coming. Build anticipation through save the date announcements and share about why your team is fundraising for the cause. Keep it light, fun and informative

60 Days Before Launch
- Send postcard Save the Dates to potential supporters
- Post a Save the Date announcement through email and social media
- Create a Facebook event or other means to put the event on people's calendars

3-4 Weeks Before Launch
- Share the vision and impact of the story through emails to potential supporters and social media posts. Be sure to share a direct link to your story.

1- 2 Weeks Before Launch
- Announce your story anywhere and everywhere!
- Share your story and hashtag through Facebook and Twitter posts. Tag friends in your posts.
- Email your extended network to let them know the campaign is beginning soon

Day of Launch

Use this time to capture the energy of the built-up anticipation. The day is finally here! Promote the importance of the cause, the impact of support, and recognize the momentum from all the initial donors (including pre-motion)

- Email your entire network that today's the day!
- Post on social media throughout the day of the official launch.
- Tag your friends and encourage them to donate and show support on social media through liking or sharing your posts about the campaign. Keep in mind that commenting on the posts boost them higher in news feeds than just clicking the like button.
- Thank donors generally and give shout outs to specific individuals through social media

After Launch

This is crunch time. Keep outreach regular and engaging. Ideally you have a daily cadence of outreach. With the campaign finally here you must seize every chance to engage supporters.

Reach out through all channels available to you, with highest frequency on Facebook and other social media channels.

Incorporate visuals to help tell your story. Photos or videos the team, aspects of the cause, or meaningful moments in the campaign like hitting the project goal or hitting 100 supporters all help to make your supporters feel informed and a part of the team.

Incorporate a mix of Calls to Action and Updates. Breaking from asks to share information and recognize supporters keeps your audience engaged with your messages.

Calls to Action
- Ask for a contribution. Frame asks in terms of the impact the contribution makes on the cause.
- Encourage your audience to promote the campaign to their networks by sharing on social media or sending emails.

Updates
- Share information and updates about the cause itself. Continue educating supporters about why you are fundraising.Share testimony from people affected by the campaign.
- Recognize supporters with heartfelt thank yous. Personalize thank yous with tagging. Call out land-mark donors like the 50th, 100th or 500th supporter.
- Update donors and potential supporters as you reach the following thresholds towards your goal: 30%, 50%, 75%, 90%. Translate the dollars raised in to impact on the program
- Announce when goal is met and stretch goals

1 Week Before Campaign Ends
- Update audience with the progress thus far and alert them that only "x" amount of time left to reach the goal. You should be posting daily (at minimum) during the last week of your story's funding lifecycle.

Day Campaign Ends
- Make a final ask
- Thank supporters

As soon as your campaign ends, begin stewardship of your entire group of donors. We'll dive in to Stewardship planning in the upcoming section.

Your outreach calendar starts many weeks before the campaign launch date. You'll want to build out your calendar as soon as you have a launch date to work around. As your storytelling team builds out the campaign, work together on the specific messages.

Work ahead and your life will be much easier when it's time to get the word out. Remember, "If you build it, they will fund" is simply not true: you'll need persistent outreach to create momentum and engagement around your story.

NEXT STEPS:
- ¬ Determine your launch date
- ¬ Build your outreach calendar with specific dates
- ¬ Craft your pre-motions and updates ahead of time
    - ¬ Have your team give feedback and ideas about the schedule and content

Write Your Updates

You've worked hard gathering a team, building your campaign and marketing the launch. Now, you can just sit back and let the funding roll in, right?

Wrong. One of the biggest mistakes that campaign creators make is thinking people will automatically give once the initiative is live and accepting donations. Even if you have a beautiful online fundraising page filled with compelling content, you are still responsible for keeping (and gaining) momentum throughout the life cycle of the campaign. One of the easiest ways to achieve this is through marketing updates.

Studies show that updates more than double the success of your fundraising campaigns.

Ideally, you should be providing an update each week (in fact, studies show that campaign owners raise three times more money if they update supporters every five days). However, updates don't have to be boring or labor-intensive! Just a few sentences and/or some visual content can be enough to keep supporters engaged with your story.

Remember, your donors are investing in you and your cause. They are taking a risk, not knowing 100% if the campaign will succeed. It's up to you to not only assure them through updates, but also keep them engaged in the cause so that they are more likely to help you by telling their friends, sharing updates on social media, etc.

The Benefits of Updates:

- **Updates Keep Your Campaign Fresh**
  Don't assume that potential donors are paying attention to how long a campaign has been live or how long it has left to run. A campaign without any updates is more likely at risk to feel abandoned and stale. Updates allow you breathe new life into already-established content.

- **Updates Allow Communication Beyond The Ask**
  Building a relationship with the donor is just as important as raising funding for your cause. To avoid donors ignoring your messages because they assume you will be asking for money, break up the asks with notes of thanks and valuable information about the cause.

- **Updates Encourage Continued Giving**
  Keeping donors up-to-date helps them have a deeper investment and understanding of your initiative's progress. This will come in handy if you announce a stretch goal or need a strong push to meet your goals. Your updates will let everyone know what's going on, therefore they are more likely to take action when needed.

- **Updates Build Trust with Transparency**
  Providing regular updates will help keep you honest about the status of your initiative, which in turn will help you gain trust with your audience. Trust is at the core of people wanting to support your cause, and can make or break your long-term success.

- **Updates Show You are Just as Invested as the Donor**
  This is in line with the importance of building a relationship. You want to show the donor that you are equally invested in making sure the campaign is a success - not that you're expecting them to pull the weight to make it happen. Updates show your continued engagement in the initiative, which in turn helps potential donors feel like you are a partner in this journey and will make it happen once the funding goal has been reached.

Methods of Sending Updates:

Updates can take many forms throughout the life cycle of your campaign. Using several methods will ensure that you can reach a wide audience when dispersing important campaign information:

- **Through Your Website Platform**
  Many platforms allow for updates both via email and on the campaign page itself. More information about how it works on the Community Funded platform can be found in this video.

- **Social Media**
  Linking social media posts that have updates about the campaign is a smart way to gain exposure to your cause. This also allows people to easily share the information with their peers with no risk.

- **Email**
  If you want to send updates beyond the platform, utilizing your organization's email software is another way to reach a wide audience.

- **Newsletters**
  Use any newsletters/blog posts/online news feed for your organization to post updates about your cause, if allowed.

- **Word of Mouth**
  Even though you can't easily link back to the campaign page, word of mouth is an exciting way to inform people what's going on, because people will hear the energy in your voice and hopefully pass that positivity along when sharing what they learned. However, because it's not concrete, it is recommended that you use one of the other update methods.

- **Phone**
  Similar to word of mouth, phone calls are an effective method for verbal communications, and can be utilized when there is a need for personalized updates. For example, maybe phone call notifications are reserved for donors who give $1,000 or more to your cause. If you plan to use this method, be sure to plan carefully (one or two times during the life cycle of the campaign) so that you do not end up pestering the donor.

Anatomy of an Update:

Regardless if an update is made before, during, or after a campaign, here are core pieces of information to include so potential supporters stay in the loop:

- **Express Thanks**
  This is crucial, especially if you already have donors supporting your cause. Express sincere gratitude for the support you have received thus far. If you haven't received any support yet, still thank people for taking the time learn about your initiative.

- **Share What's Been Happening**
  Potential donors will want to feel like they are part of your team. Be 100% transparent by telling them what has been going on with the initiative. When providing an update, it's especially important to share the impact being made (number of dollars, donors, social media shares, etc.) so that excitement around the campaign keeps momentum.

- **Share What's Coming**
  What's next for your campaign? Upping the goal if you reach it early? Spending some of the money to support the cause before the campaign has finished? Give your audience a teaser as to what might be next in the exciting world of your campaign.

- **Clearly Explain How People Can Help**
  You don't want to include an ask in each of your updates, but your should always have a call to action. Whether it's asking people to forward your email to three friends who might be interested, share on social media, or another action, your audience should always know how they can help you.

- **Help People Visualize the Cause**
  Video, images and infographics can go a long way with helping your audience feel connected to your initiative. Don't just tell them about what's happening, help them see it!

- **Let People Know How They Can Keep in Touch**
  Always maintain an open-door policy with your donors and include ways they can get in contact with you if they have additional questions or want more information on how they can help.

Update Types

There are 7 main types of updates you can utilize during the life cycle of your campaign. Each one has a specific focus and can be intermingled so that you are providing thorough and comprehensive information to your supporters:

- **Social/Public Promotion**
  This update is a call to action for your supporters, and asks for them to share your story through their various social media channels (Facebook, Twitter, Instagram, etc.). These updates work best at the beginning of your story's life cycle.
  - » **Example:** "We are feeling the love, but would very much appreciate more support for this important cause! We ask that you please share this story on your social media channels to help us gain more awareness."

- **Progress Report**
  This update specifically tells supporters the status of the story, and what's been accomplished thus far. The progress report works especially well at the midpoint of your story being live.
  - » Example: "Our story is resonating with a lot of people! We have 123 donors who have collectively supported us with $5,365 dollars! Our next goal is to raise another $2,000 in the next five days."

- **New Content**
  This update outlines any new ideas that have been discussed since the launch of the campaign, and will keep up supporters up-to-date with the latest strategies.
  - » Example: "While working hard to make this cause a reality, we came up with this awesome new idea that we would like to share with all of you!"

- **Reminder**
  This updates makes sure that deadlines are kept top-of-mind for supporters, and can often be the most important one when conveying urgency and a need for action.
  - » Example: "Just three days until this our campaign is complete! We really need your help with a final push to the finish line so that our dreams become a reality."

- **Provide Answers**
  This update provides feedback to common questions you may be receiving about your story or to be proactive in giving updated information.
  - » Example: "We wanted to let everyone know that these are the fasted ways you can reach our team to provide feedback on our story!"

- **New Reward/Match/Challenge**
  This update provides information on any new incentives provided for your cause, and works best toward the end of your story's life cycle to help with the final push.
  - » Example: "Great news! Thanks to the generous culture of our community, we have a new $1,000 matching gift! Please help us unlock this potential with your support!"

- **Appreciation**
  This update is all about your supporters! Provide a feel-good note of thanks to show how much they meant to the success of your cause.
  - » Example: "You are the reason we are celebrating right now! Thank you for all of the much-needed support to make this dream come true."

Happy Updating!

NEXT STEPS:
- ¬ Plan Your updates! Think about how many you'll need (one/week for the life cycle of the campaign, plus before and after the campaign is live).
- ¬ Determine which update methods might work best for your particular campaign, and choose at least 2-3 options.
- ¬ Develop an update calendar for easy tracking.
- ¬ Make campaign updates on a consistent basis so that your audience continues to feel engaged. Be creative and have fun!
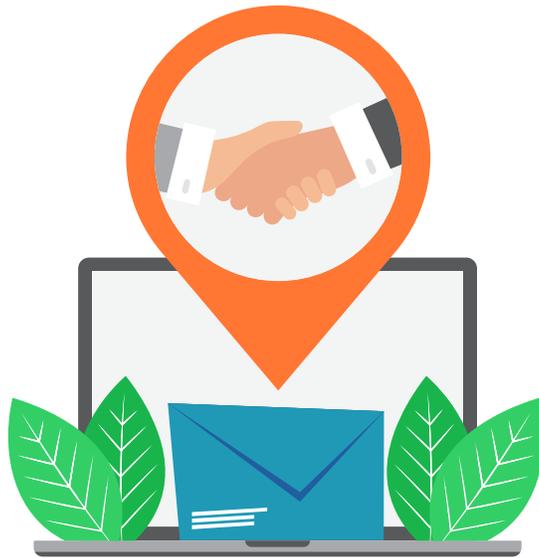
Steward Your Donors

Thank You.

These two seemingly simple words can have a profound impact on the success of your story. While significant effort goes into creating your initial story, the sustainability of ongoing support is equally crucial.

Many organizations track their donor retention rates, and for good reason. It costs an institution less to retain a donor than to acquire a new one, supporters are more likely to come back and donate to another cause for your organization if you show them how much your appreciate their generosity.

Remember, giving is a full-circle cycle. If you want supporters to be generous with their time, treasure, talent and/or testimony, then you need to be thoughtful in how you communicate with them during and after the campaign. Additionally, you'll form a deeper relationship with the supporter, build trust both with your specific story and as a representative of the organization, assure your supporters that you see them as more than just dollar signs, and increases the chances of them supporting you with a future cause.

So, let's dive in to the ways that you can successfully convey impact and admiration for your wonderful supporters.

How to Express Gratitude

Saying thanks in the right way is crucial. Though it can take many different forms, supporters want to feel appreciated and want know how their money, time, and other efforts have helped your initiative. This should be at the core of your stewardship communications. Beyond that, you'll also want to ask yourself:

- **How do you want a supporter to feel after the campaign?**
- **What do you want a supporter to do after the campaign?**
  (Example: Keep following our robotics team, be willing to support other great causes, etc.)

Knowing the answers to these questions will help guide the decisions and strategy for effective stewardship.

Ways to Say Thank You

This is the fun part! Saying thanks makes your supporters feels appreciated, keeps them engaged with your cause, and increases the chance that they will support future initiatives. Getting creative and developing new ways for stewardship outreach is always highly encouraged, but here are some ideas that can serve as a good foundation when planning:

- **Mass Messaging**
  This method is useful for sharing widespread information (for example, overall campaign numbers/stats), especially if you plan to use infographics or other un-personalized videos. However, since personal touches are always the best option, we suggest this only as one step in communicating with supporters.

- **Thank You Letter/Notecard**
  A great thank you note is a welcome piece of mail, especially when personalized to the donor and perhaps even handwritten. This is also an easy task to get volunteers involved, if you are aiming to write a note for each donor.

- **Email**
  Sending a thank you email to your supporters allows for the use of graphics, video links and other features that are available to offer via a letter. Keep in mind that if you are using this as a the personalized option, consider using software that allows you to send individual emails to each donor versus in bulk, so that the donor truly feels like the note is just for them.

- **Videos/Pictures**
  A thank you video from someone who benefited from the donor's gift or a personalized photo is a great way to make someone feel special. These should be privately shared directly with the donor. Don't mass share it during your campaign! For more information, read this article for more on video creation and image cultivation.

- **Phone Call**
  This is a great strategy, both while the campaign is live and after it has ended. You can either plan to tackle a certain number of calls each day, or develop a simple "thank-a-thon" program. Even better, get the people who are impacted by the support to make those calls, perhaps to your top 10 supporters if they can't accommodate for everyone.

- **Social Media**
  Many people love a great shout-out, making social media a very effective tool in thanking supporters. It's an easy way to put your supporters in the spotlight, spreads the word about your campaign online, and it shows that you're actively engaged and paying attention to your supporters. Everybody wins! You can choose a certain person to highlight each hour, tag supporters to campaign updates, etc.

- **Private Events**
  Was your campaign centered around something really cool that's happening in the community? Consider throwing an exclusive event for your supporters so that they can see some of the action up close and have an opportunity to talk with the people who are positively impacted. This is especially beneficial when many of the supporters are local, but you can record or live-stream the event for people who cannot attend, if needed.

Timeline for Expressing Donor Impact

Saying thank you is not a one-and-done task. Although you do not want to overwhelm your supporters with various communications, saying thank you several times is crucial. Plan a schedule for when you will reach out with notes of thanks and a updates on the cause.

Consider this timeline for thanking supporters:

Thank You #1: Within 24 hours of the gift or at the close of the story
As a best practice, finding a way to thank a donor immediately after they give is a must. Aside from a tax receipt, this confirms with the donor that you received their information and their money went to the correct cause. To help keep supporters invested, you can tell supporters that more updates about the cause will be sent to them in the near future.

Thank You #2: Within two weeks of the story ending
In addition to any personalized touches for your supporters, this is the ideal time to send that mass communication, so that everyone knows the overall success of your initiative and next steps.

Thank You #3: 30 days after the close of the story
Start giving detailed specifics about how you are using (or plan to use) the donor's money. The more information you can provide, the more the donor will feel like they are still part of the journey with you.

Thank You #4: 3-6 months after close of the story
This is a great time to really show the impact versus tell the impact. Images, videos, personal testimonies and other pieces can be collected and shared with your supporters, as a means to provide in in-depth update on the status of their investment with your cause.

Thank You #5: One year after close of the story
Think about how surprised you would be to receive a note of thanks and update on a cause you supported a year ago, with no additional ask attached! This is truly a treat for your supporters. Tell them what you accomplished in the past 365 days because of their generosity and be sure to provide contact information in case supporters want to respond.

Please note that within the schedule, you should be using a mix of the various ways to say thank you. Diversifying your communications provides a greater chance that your thank you efforts will effectively reach your audiences.

Tips to Help Your supporters Feel Special

Now that we've covered the basics on thanking your supporters, here are some additional notes to help you go above and beyond:

- **Get Your Personalization Right**
  Make sure that you are acknowledging supporters by their preferred names and titles, and that you have the correct contact information. This helps tell the donor that you know who they are and care about them as a person.

- **Segment your supporters**
  If you are collaborating with your organization on an effort, think about the segments that matter most and plan your stewardship accordingly. For example, offering unique experiences to people who give above a certain amount could be worth the effort. Also think about your donor demographics (age, geographic location, etc.) when considering how to say thank you. The more you can tailor to them the better.

- **Use donor-centric language**
  Make sure you are constantly and consistently expressing how the donor specifically helped your cause, not just sharing general stats. If one donor single-handedly funded your entire campaign, how would you treat them and and what would you say to them? Keep that in mind as your write your communications.

- **Mimic how supporters communicate with you**
  You don't want to risk thanking your supporters in a communication that they may not even open. They'll never know how much your organization appreciates them! You can save time and resources by expressing thanks in their preferred channel. It's also important to make sure that that you keep an authentic tone throughout your messaging, so that your supporters genuinely feel gratitude from you.

- **Don't "Thask"**
  Asking for another donation or including a "give now" link in a thank you communication is not stewardship. One of the top reasons people stop giving is because they are over-solicited and under-appreciated. Keep your messaging focused on donor impact.

Creating a Stewardship Matrix

To help organize your stewardship efforts, consider creating a stewardship matrix while planning your campaign so that you can easily schedule and reference your communications. Below is a templated example of a matrix broken out by donor gift levels, but you can categorize by whatever segments make the most sense for your team.

Stewardship Calendar Matrix Example - Modify as Needed

Levels of Support	Thank You #1 Within 24 hours of donation or story ending	Thank You #2: Within two weeks of story ending	Thank You #3: 30 days after the close of the story	Thank You #4: 3-6 months after close of the story	Thank You #5: One year after close of the story
$1 - $49 Donation	Email	Notecard and Mass Communication	Email Update	Video Update	Email Update with Photos
$50 - $99 Donation	Email	Notecard and Mass Communication	Email Update	Video Update	Email Update with Photos
$100 - $499 Donation	Email	Notecard and Mass Communication	Email Update	Video Update	Email Update with Photos
$500 - $999 Donation	Email and Social Media Shoutout	Notecard and Mass Communication	Email Update	Video Update and Small Event Invitation	Phone Call Update and Follow-Up Email with Photos
$1,000+ Donation	Email and Social Media Shoutout	Phone Call and Mass Communication	Email Update	Video Update and Small Event Invitation	Phone Call Update and Follow-Up Email with Photos

Now you are ready to successfully thank your supporters both during and after your campaign! For additional tips, please use our Stewardship Pocket Guide as a reference. And, thank you!

NEXT STEPS:

¬ Think about the answers to these questions:
   How do you want a supporter to feel after the campaign?
   What do you want a supporter to do after the campaign?

¬ Select which mass and personalized stewardship methods you plan to use though the life cycle of your campaign.

¬ Determine who needs to be involved in the campaign's stewardship efforts.

¬ Plan your Stewardship Calendar. Map out timelines and what messages will be sent with a stewardship matrix as a guide.

¬ Have fun getting creative with saying thank you!