fundrazr petfundr cocopay

Creating, Running, & Managing Peer-to-Peer Campaigns with ConnectionPoint

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Agenda

- What are peer-to-peer campaigns?
- How do peer-to-peer campaign work?
- Creating your peer-to-peer campaign
- Setting up your peer-to-peer campaign
- Registration
- Campaign management
- Communication
- Resources

What Are

Peer-to-Peer Campaigns?

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A crowdfunding method that allows community and volunteers to raise money on behalf of your charity or organization. Peer-to-peer campaigns are great tools to engage your supporters, involve a wider network, acquire new donors and raise more money for your cause.

They can be:

- In-person live events
- Virtual events
- A hybrid (in-person and virtual options)
- Not involve an event at all

How Do Peer-to-Peer Campaigns Work?

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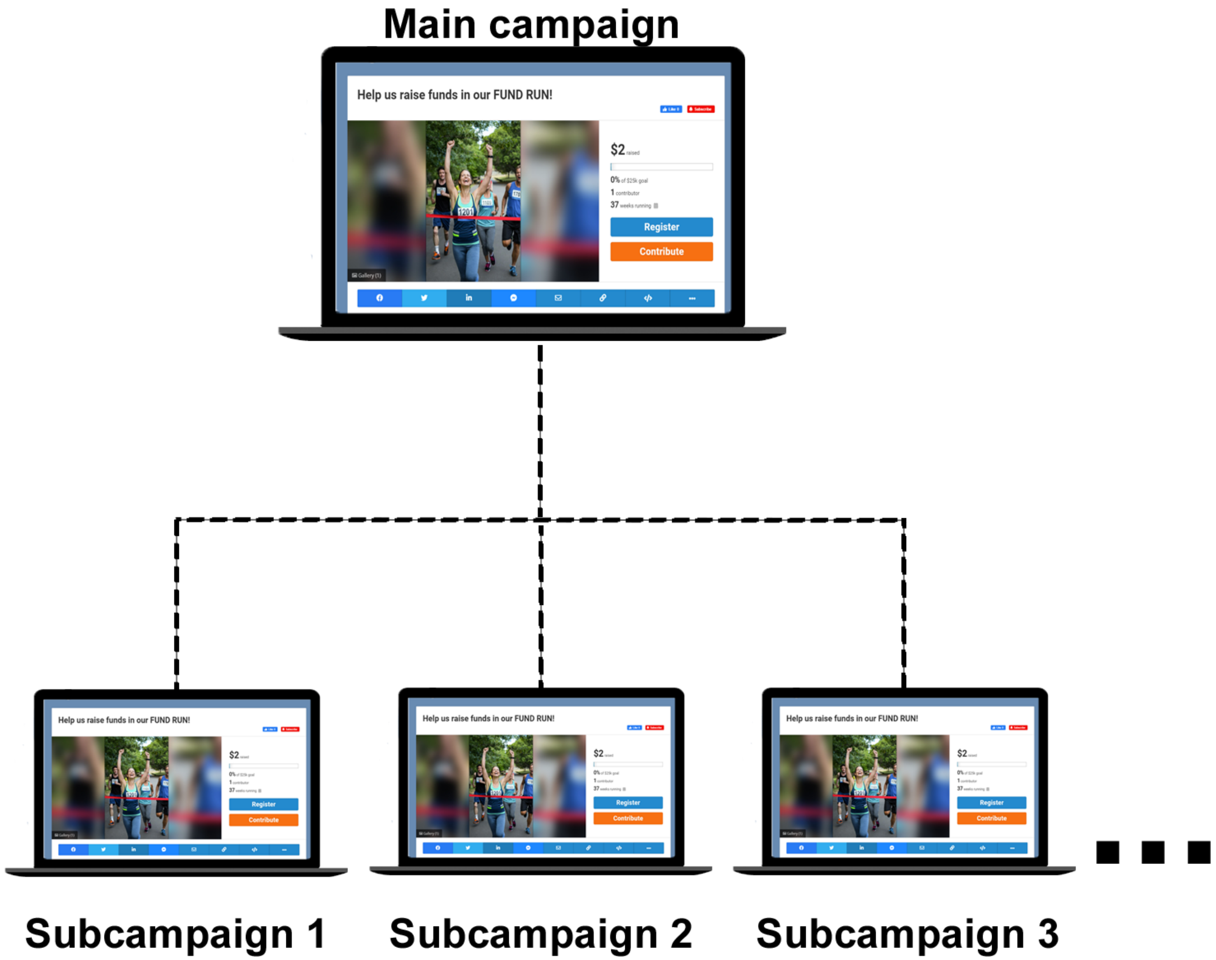
Peer-to-peer campaigns have two tiers:

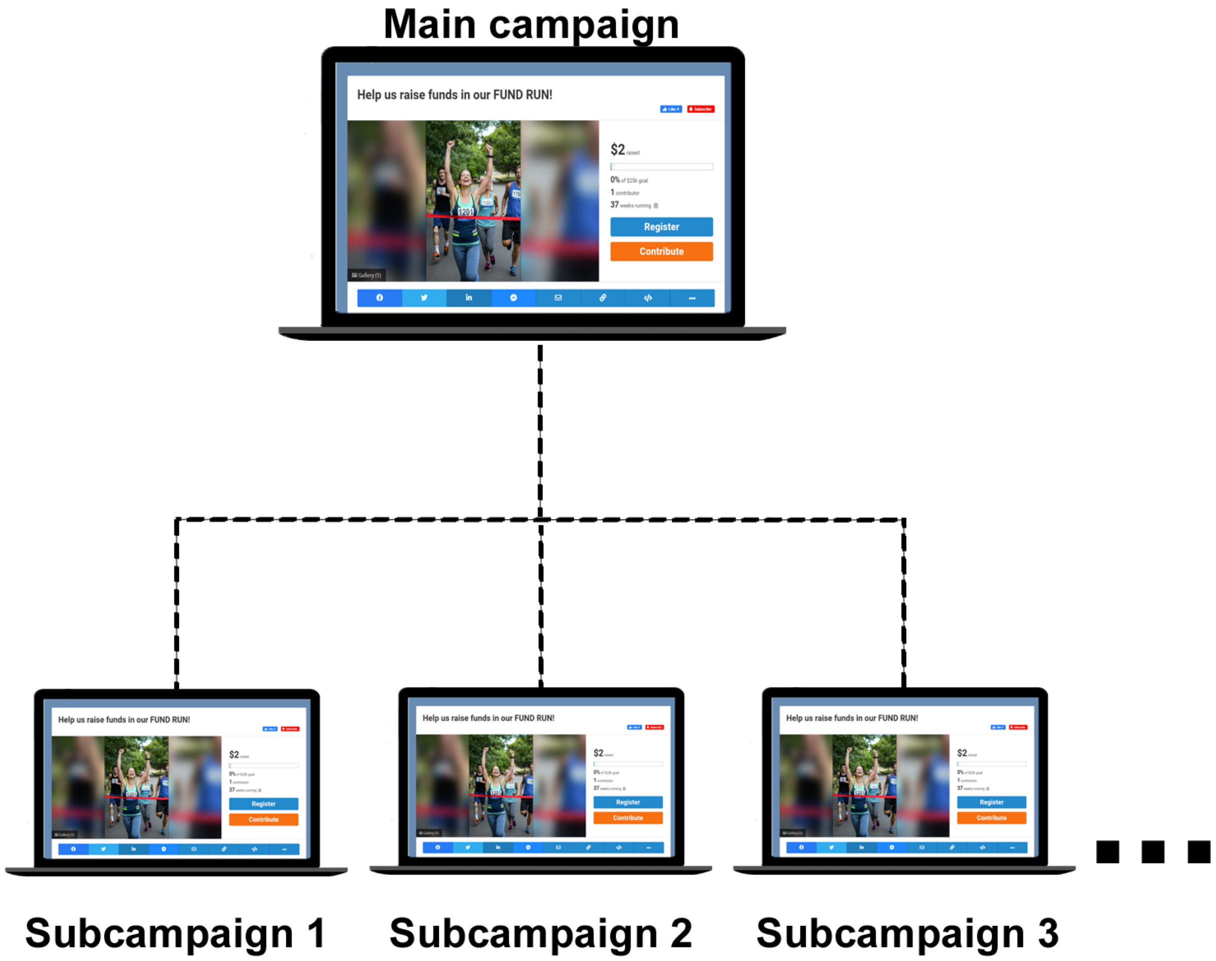
1. Main campaign:
   - One per event;
   - Set up by the organization (you) as the first tier

2. Sub-campaigns:
   - Unlimited number;
   - Umbrellaed under the main campaign (second tier);
   - Each can be run by a different individual or team of individuals.



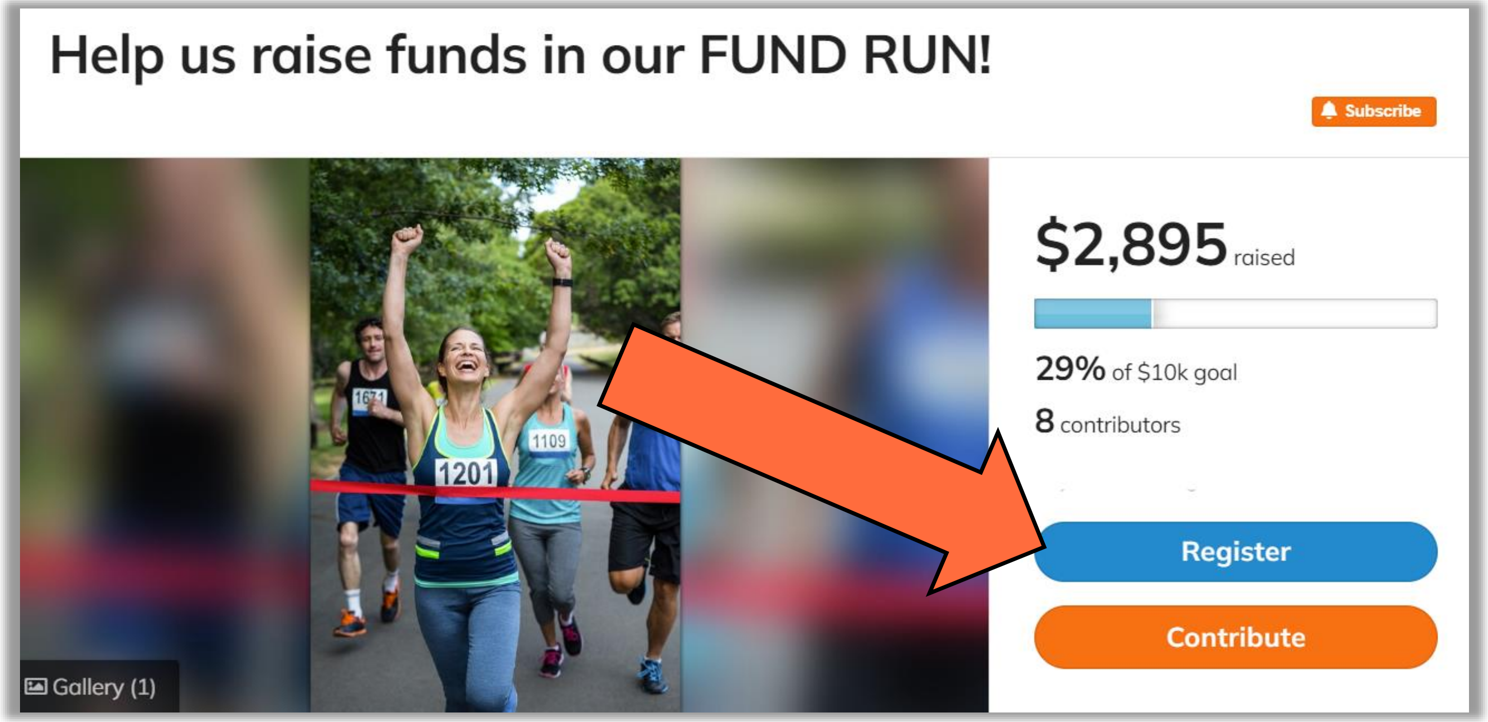
Important attributes:

- All funds raised from sub-campaigns roll up into the main campaign total.
- Sub-campaign owners have certain permissions to view and edit back-end information on their own sub-campaign only.
- Leaderboards show all fundraisers on main campaign.
- Only two tiers - you cannot have a sub-campaign of a sub-campaign.



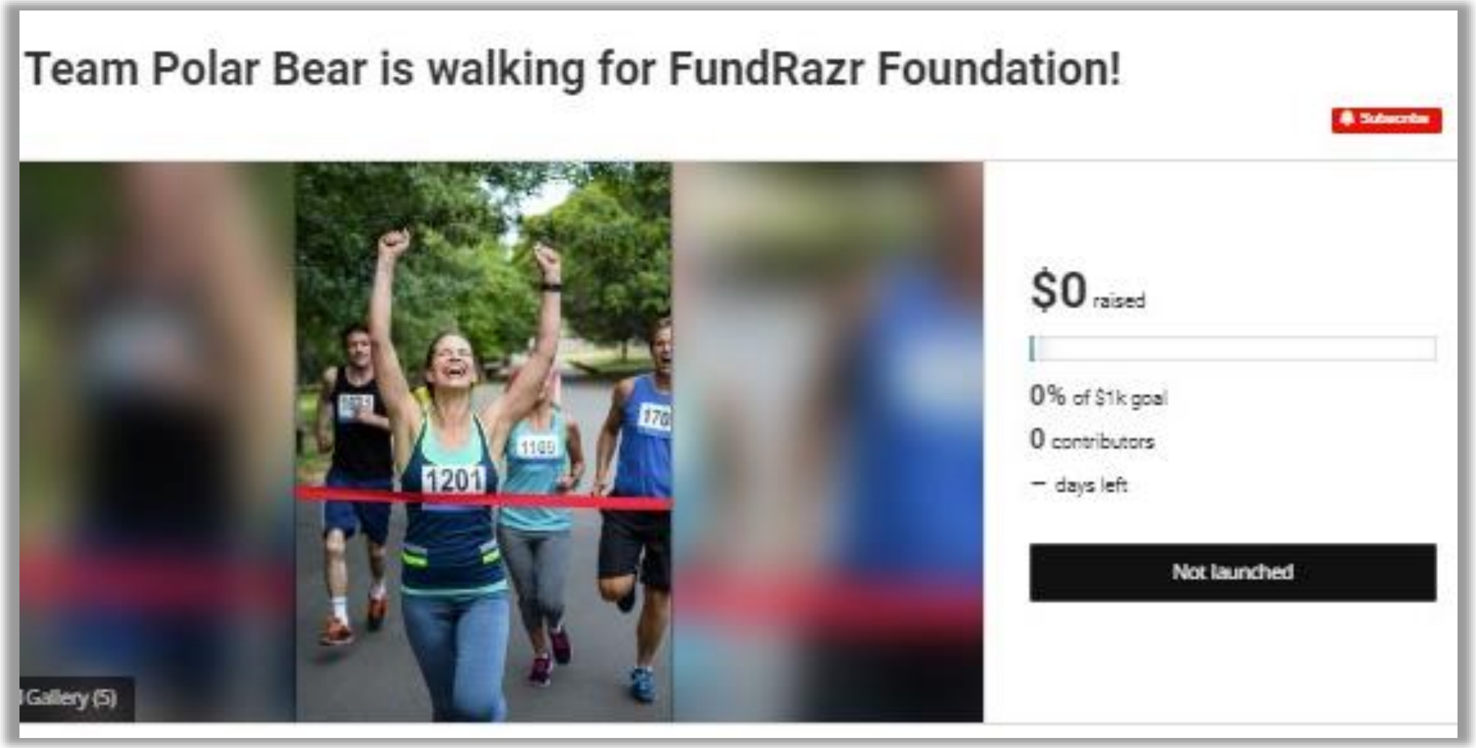
Fundraising process:

STEP 1 - Those wishing to participate register via the main campaign (fills out forms, signs waiver/ pays fees if applicable, etc.)



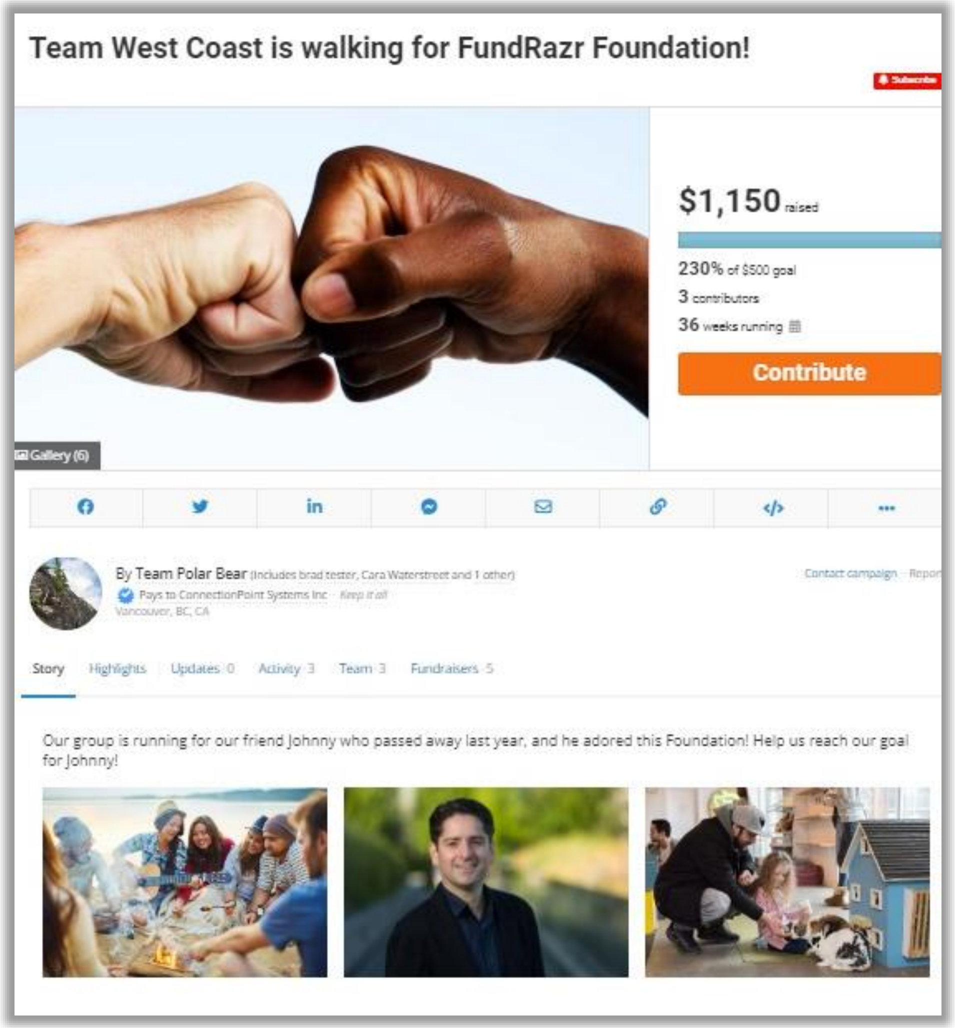
Fundraising process:

STEP 2 - Fundraisers receive their sub-campaign



Fundraising process:

STEP 3 - Fundraisers personalize and promote their sub-campaigns, then receive contributions



Fundraising process:

STEP 4 - Fundraisers update campaigns and attend event (if applicable).

The following instructions with examples are shown on FundRazr, but everything works the same for all three platforms

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Creating Your

Peer-to-Peer Campaign

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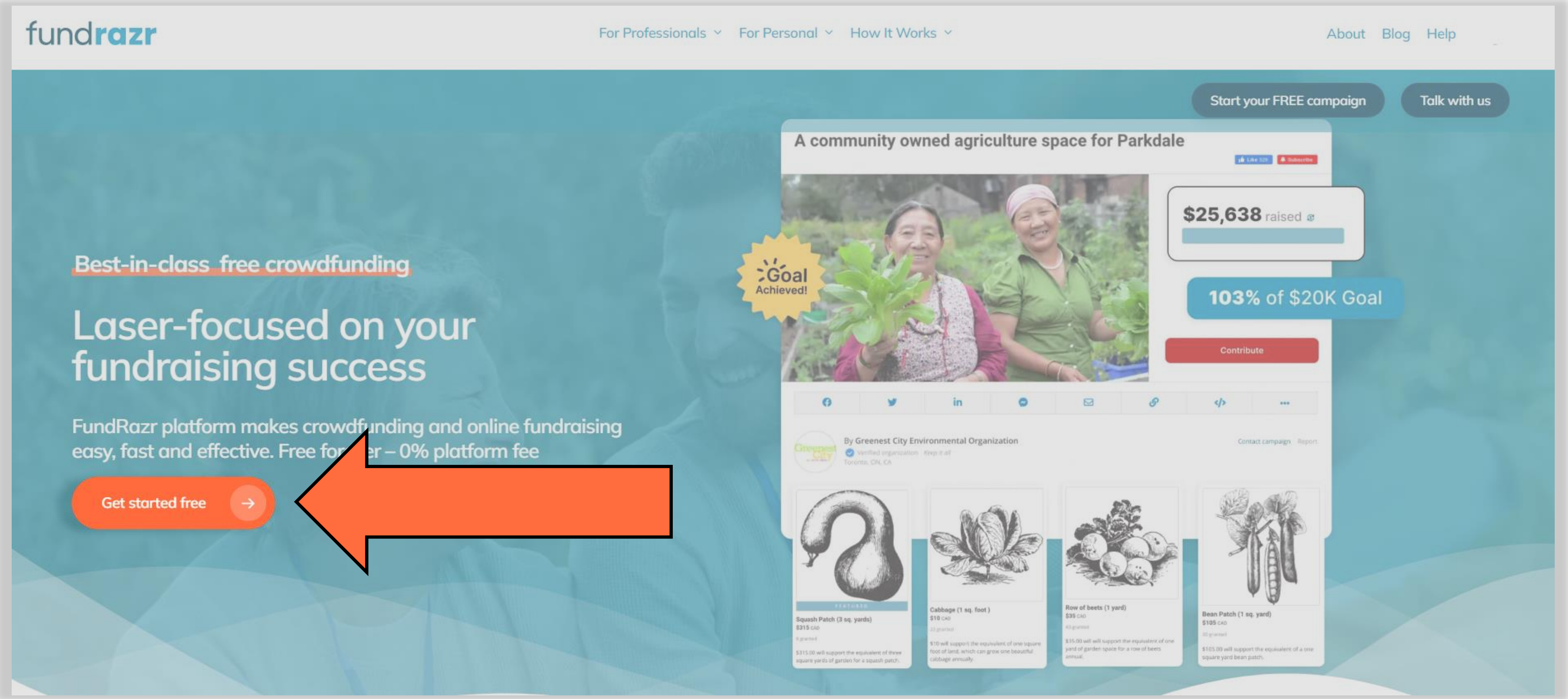
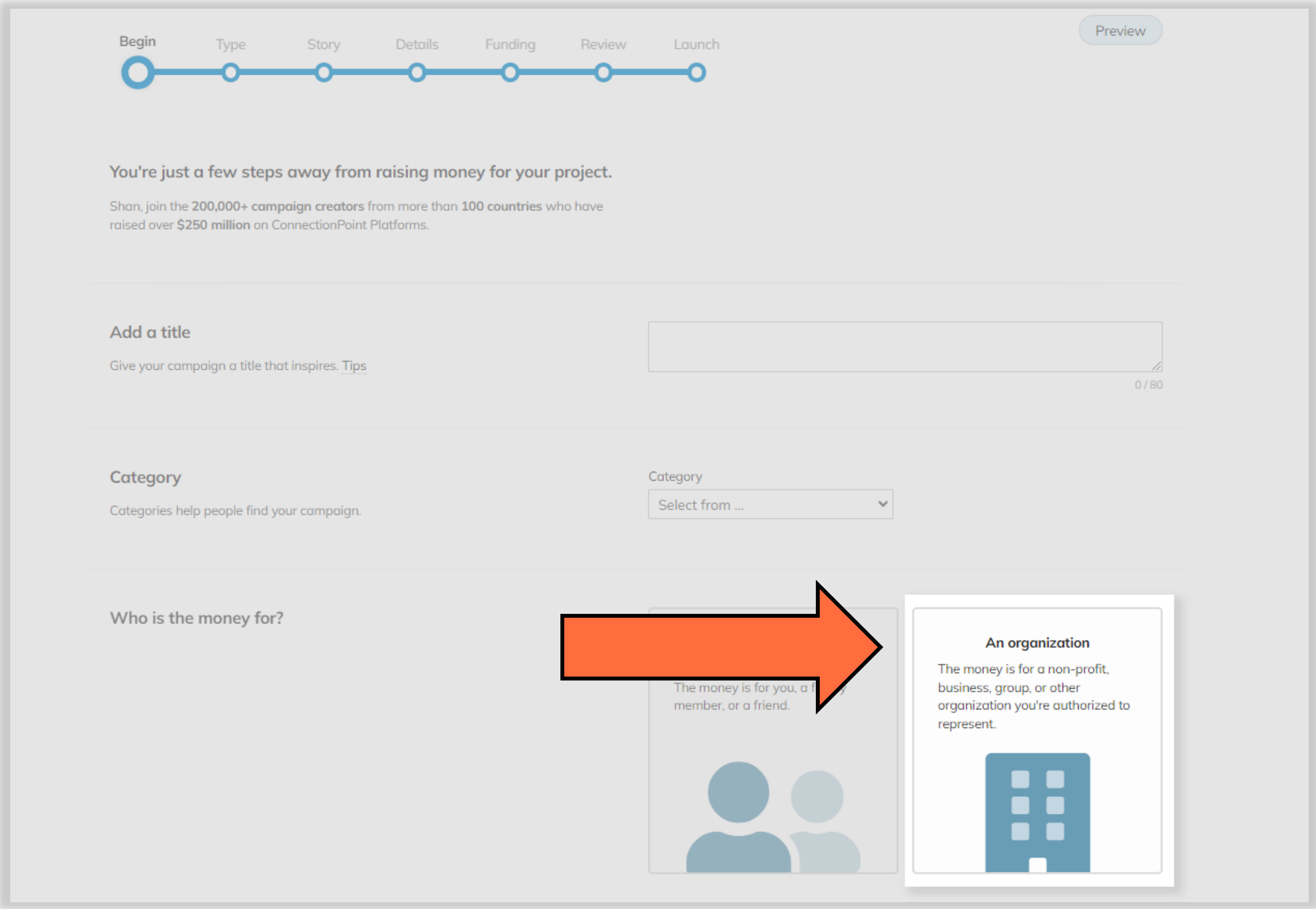
Creating Your Peer-to-Peer Campaign

1. Click 'Get started' button (or similar or other platforms)



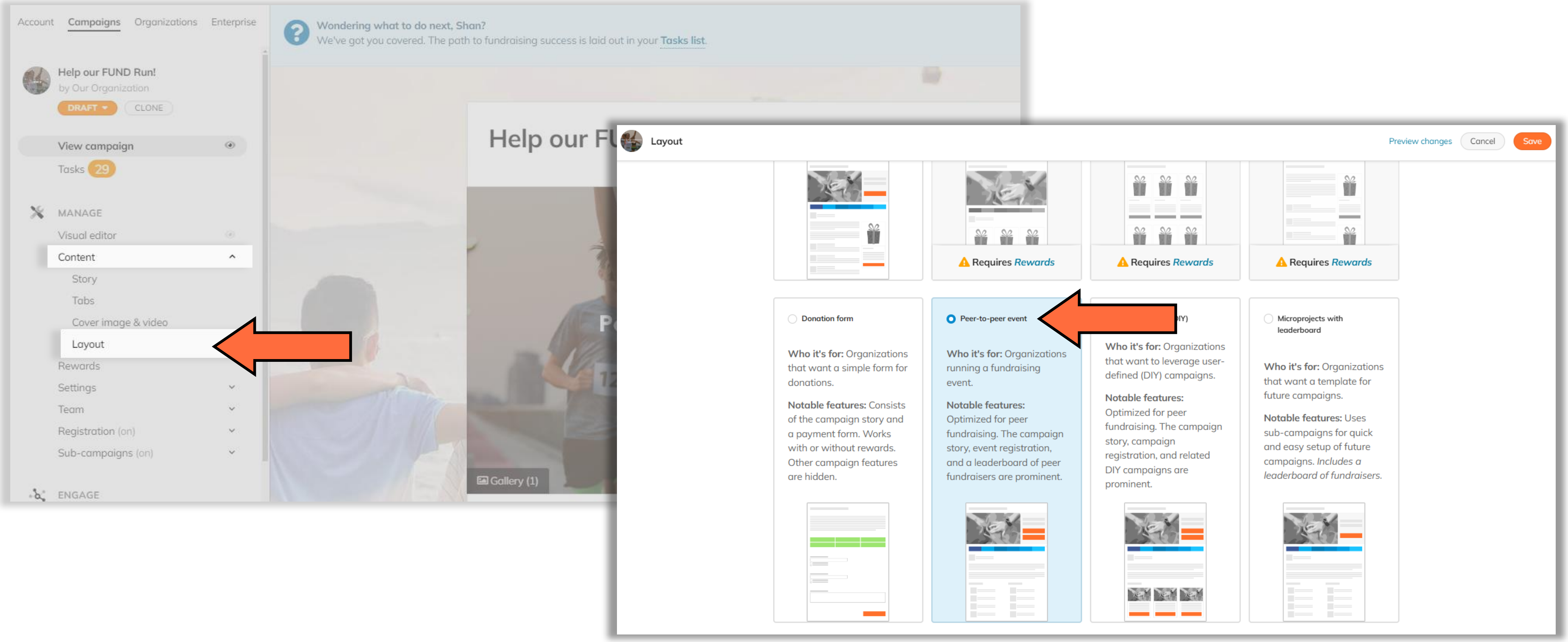
Creating Your Peer-to-Peer Campaign

*NOTE: Only organizations may use the peer-to-peer layout



Creating Your Peer-to-Peer Campaign

2. Click Content → Layout, then choose the "Peer-to-peer" layout



Setting Up Your Peer-to-Peer Campaign

Part 1: Main campaign set-up

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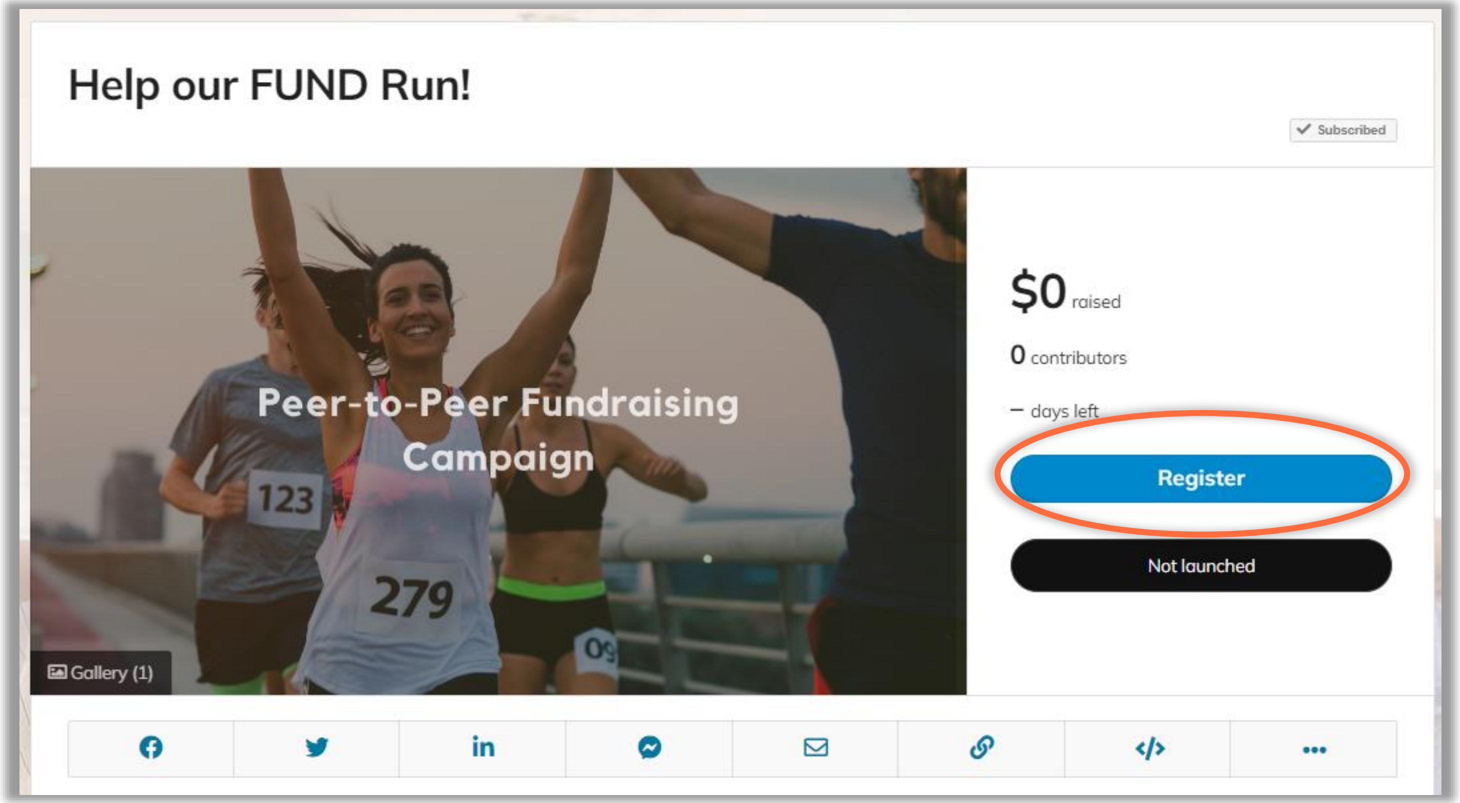
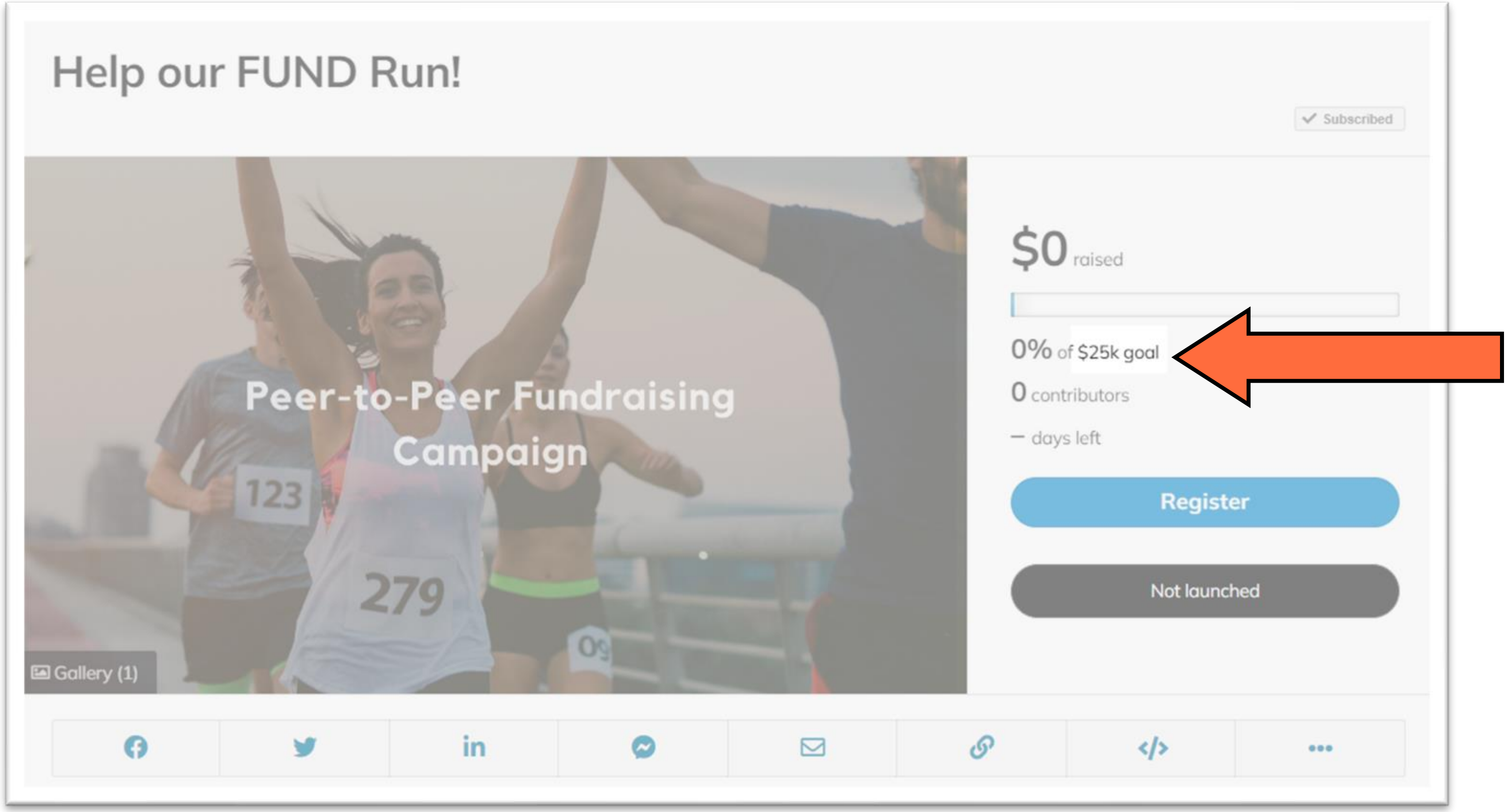
Main Campaign Set-Up

Note: Your main campaign is the only one with a 'Register' button



Main Campaign Set-Up

1. Set or edit goal - the overall monetary target for the entire campaign and event. All other goals (sub-campaign & team member) roll up into this amount.



TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/how-to-set-and-change-the-campaign-goal/

Main Campaign Set-Up

2. Write your main campaign story

Main Campaign Set-Up

2. Write your main campaign story

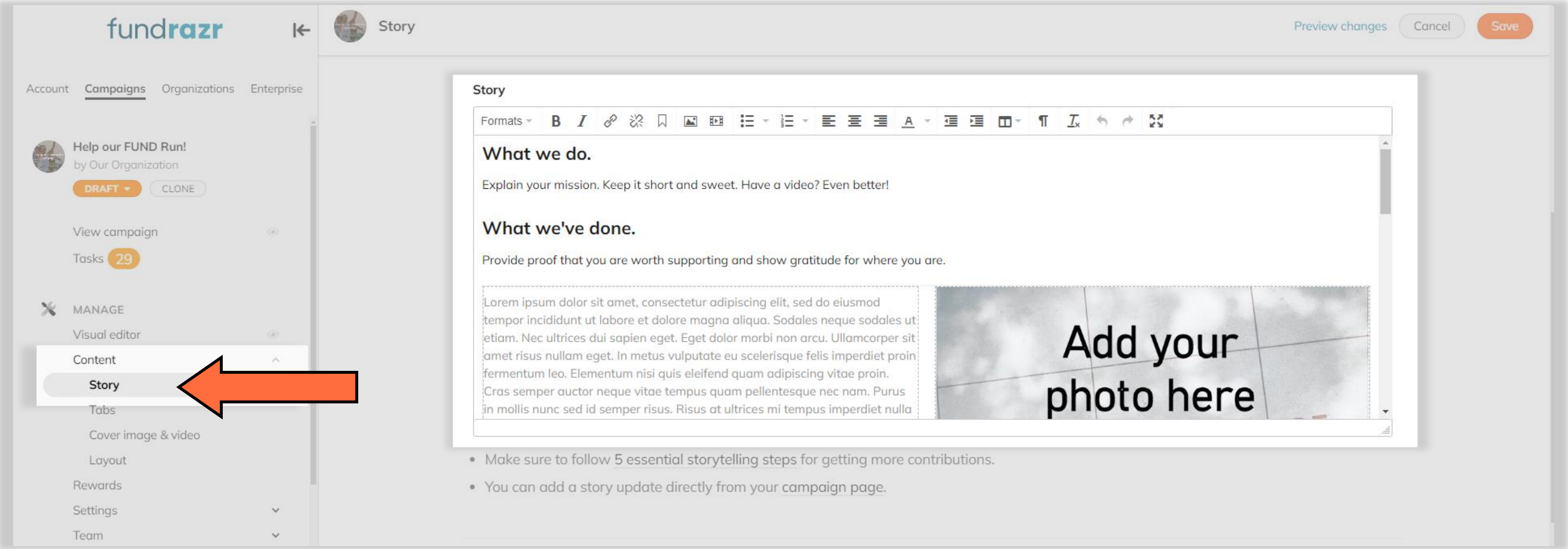
Your main campaign story is speaking to ***your participants.***

They want to know:

- Event details
- Registration information (How to register, expectations for fundraising, reward info, any specific applicable information)
- Traditional campaign story (except it becomes more ‘why should I fundraise for you’ rather than ‘why should I donate to you’)

Main Campaign Set-Up

2. Write your main campaign story

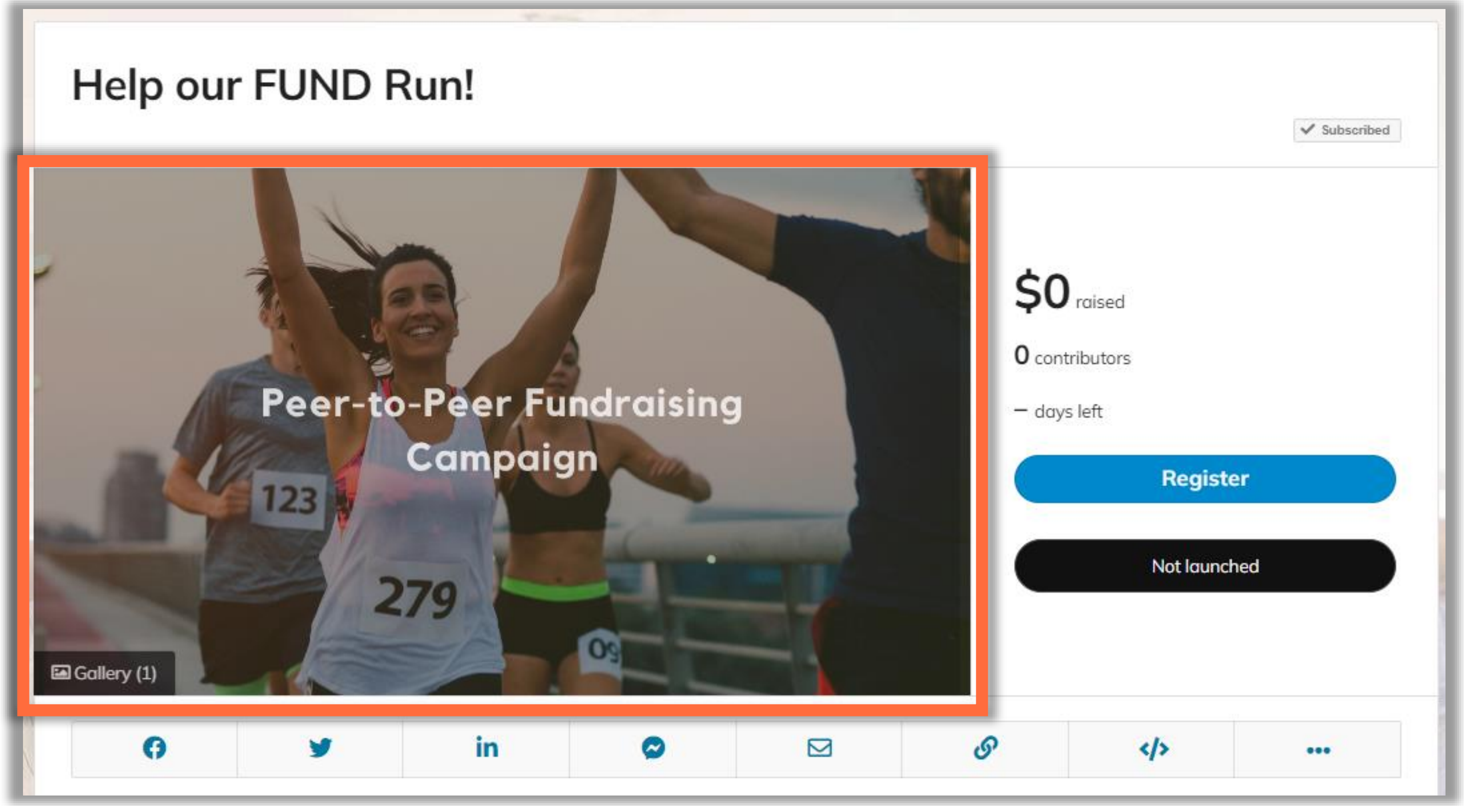


TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/navigating-the-story-editor/

STORY WRITING TIPS: https://connectionpoint.com/fundraiserhub/the-art-of-campaign-storytelling/

Main Campaign Set-Up

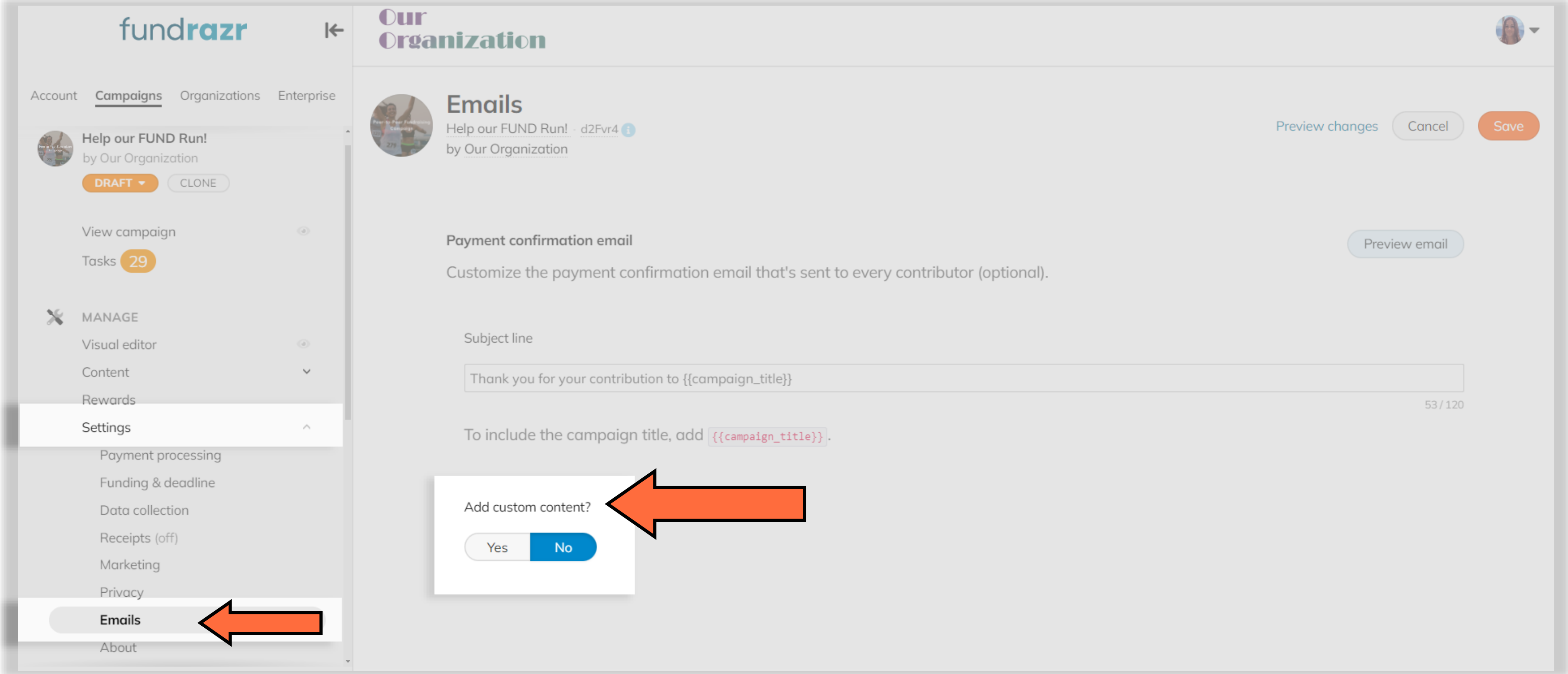
3. Insert your main campaign cover photo and video.



TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/all-about-your-media-gallery/

Main Campaign Set-Up

4. Customize the confirmation email.

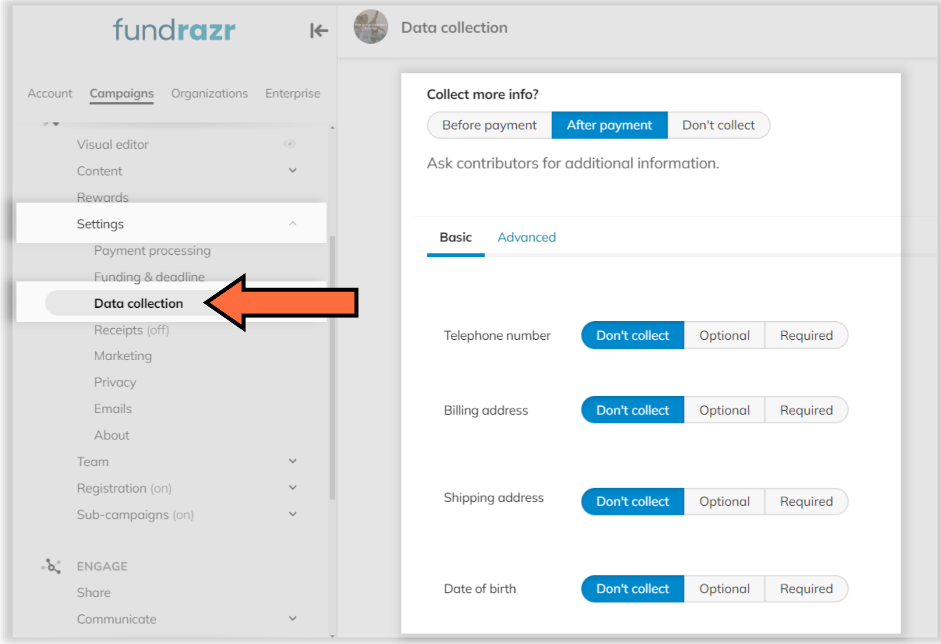


TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/how-to-customize-the-thank-you-email-to-your-supporters/

Main Campaign Set-Up

5. Choose information to collect from supporters

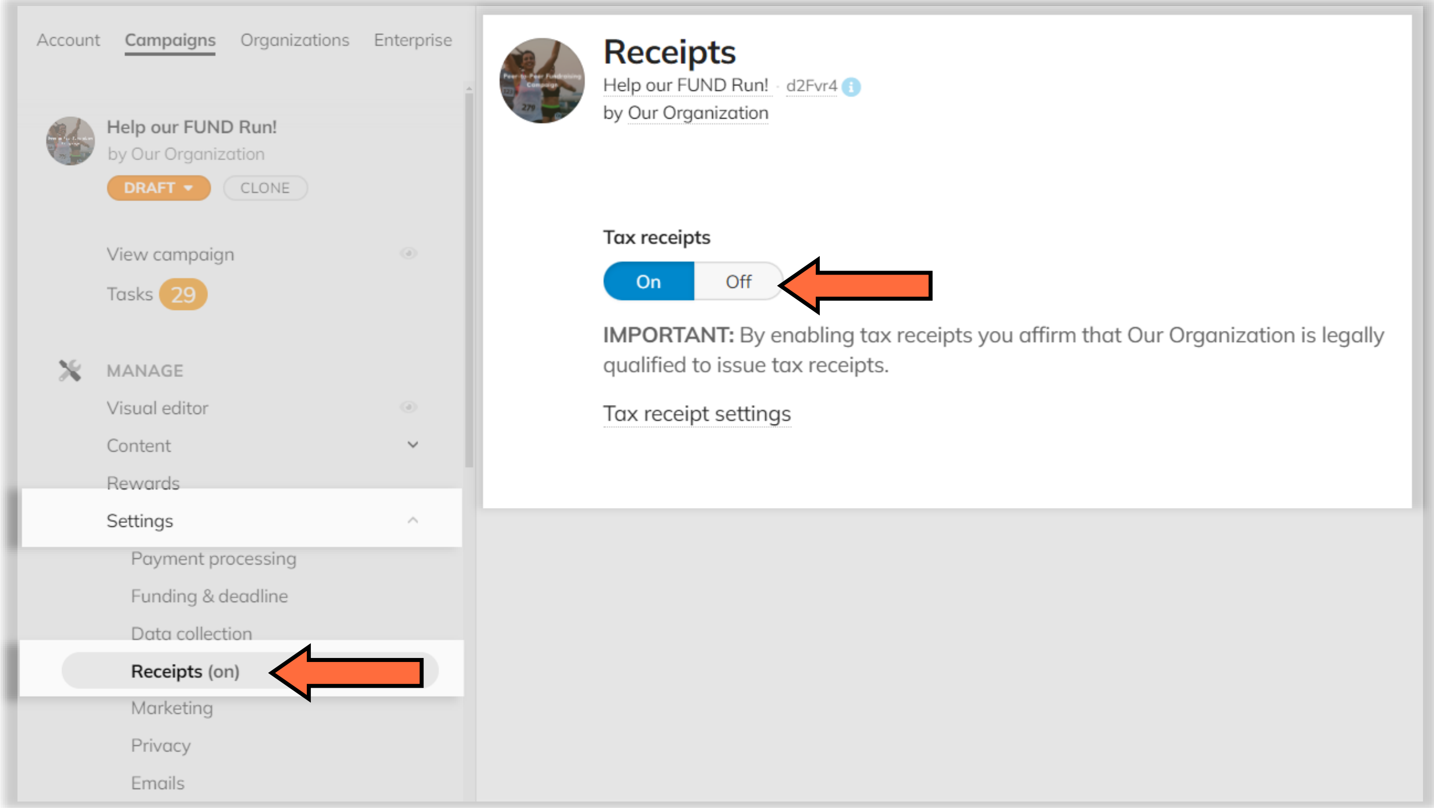
- All CPSI platforms collect names and email addresses from all supporters (and street addresses if tax receipting is turned on)
- If you require additional information, set it up in the 'Data collection' tab of the Edit menu



TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/how-do-i-choose-the-information-i-collect-from-a-supporter/

Main Campaign Set-Up

6. Turn on your campaign tax receipts (if applicable)



Note: The platform will ask supporters for street addresses automatically if tax receipts are turned on.

Setting Up Your Peer-to-Peer Campaign

Part 2: Sub-campaign set-up

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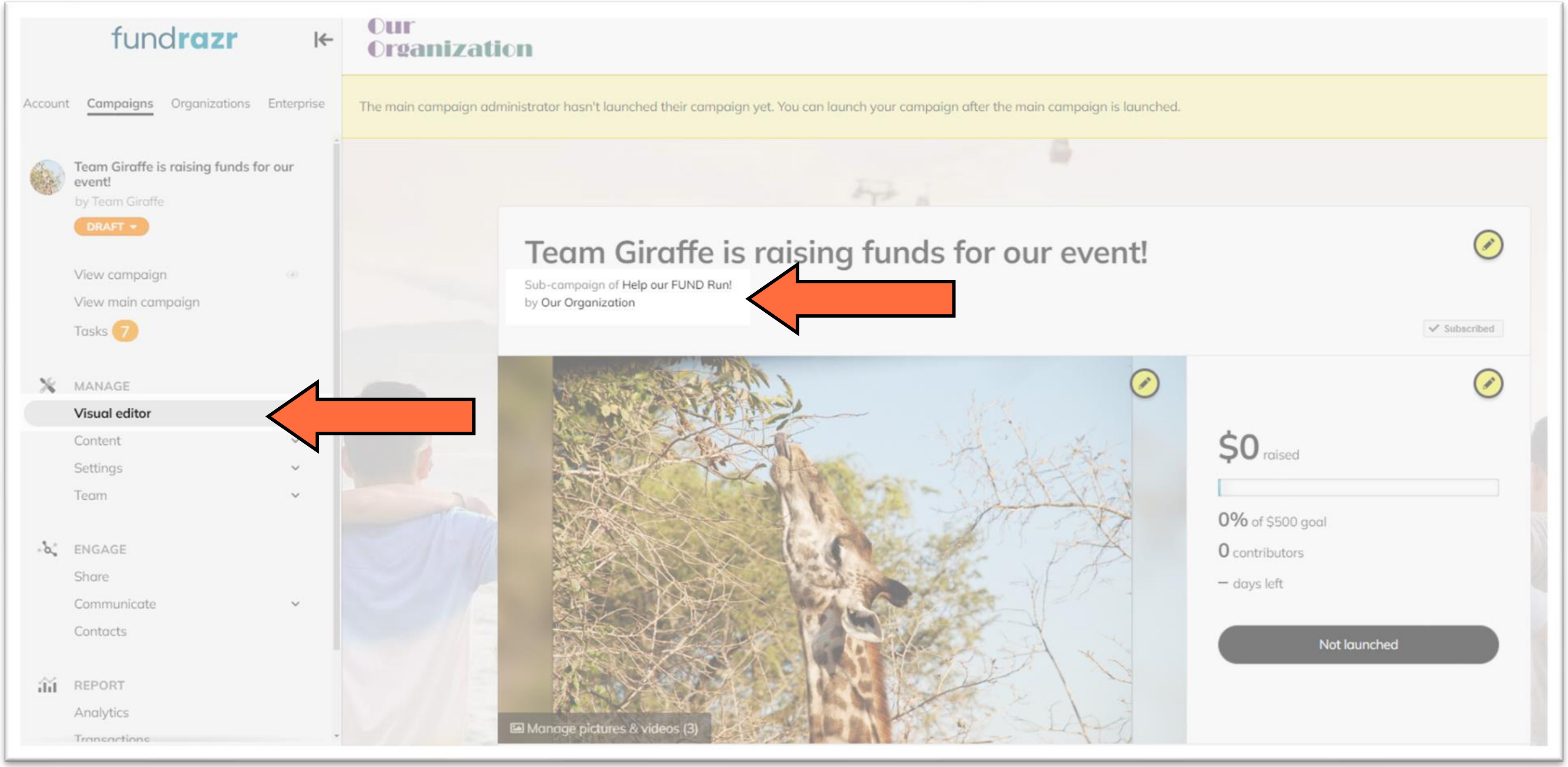
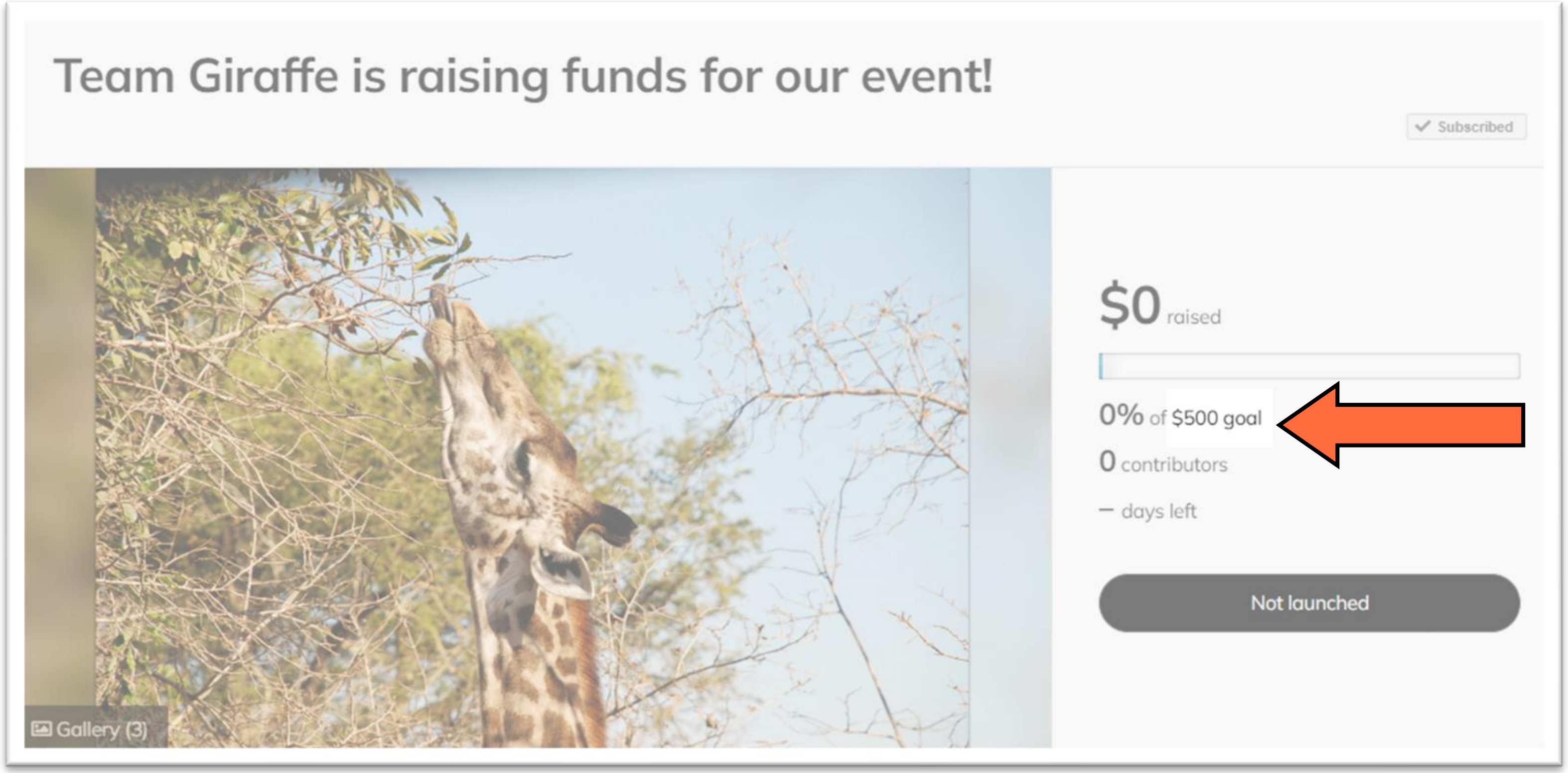
Sub-Campaign Set-Up

Note: Sub-campaigns do NOT have a 'Register' button, and contains the label 'Sub-campaign of [*main campaign title*]' *if viewing through the Visual Editor*



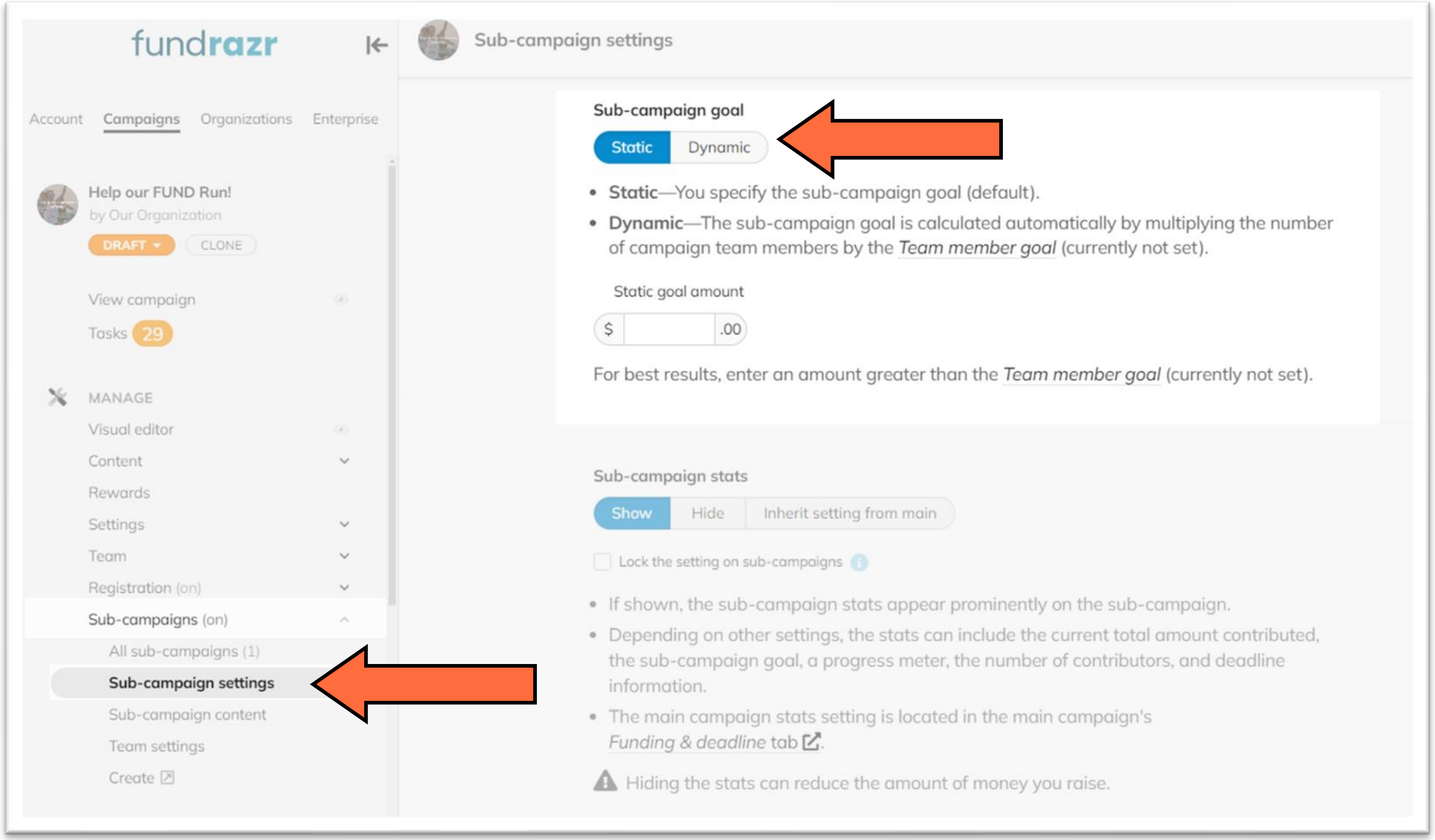
Sub-Campaign Set-Up

1. Set sub-campaign goal – the target for a specific sub-campaign (whether team or individual)



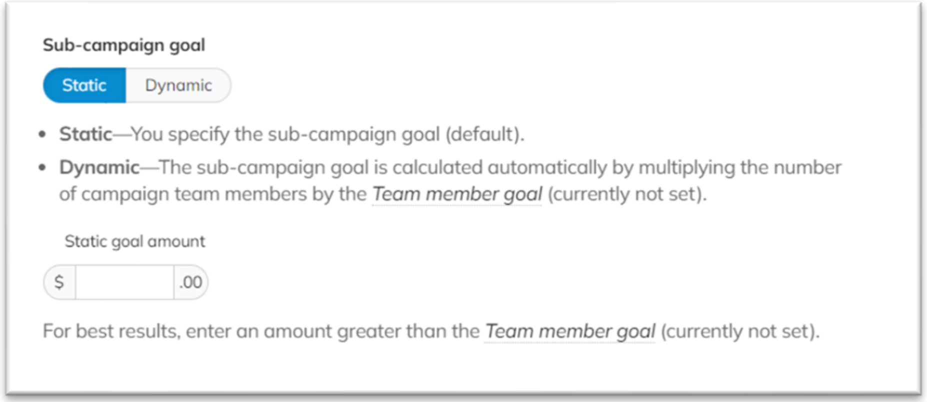
Sub-Campaign Set-Up

1. Set sub-campaign goal – done on the *main campaign*



Sub-Campaign Set-Up

1. Set sub-campaign goal – static vs dynamic

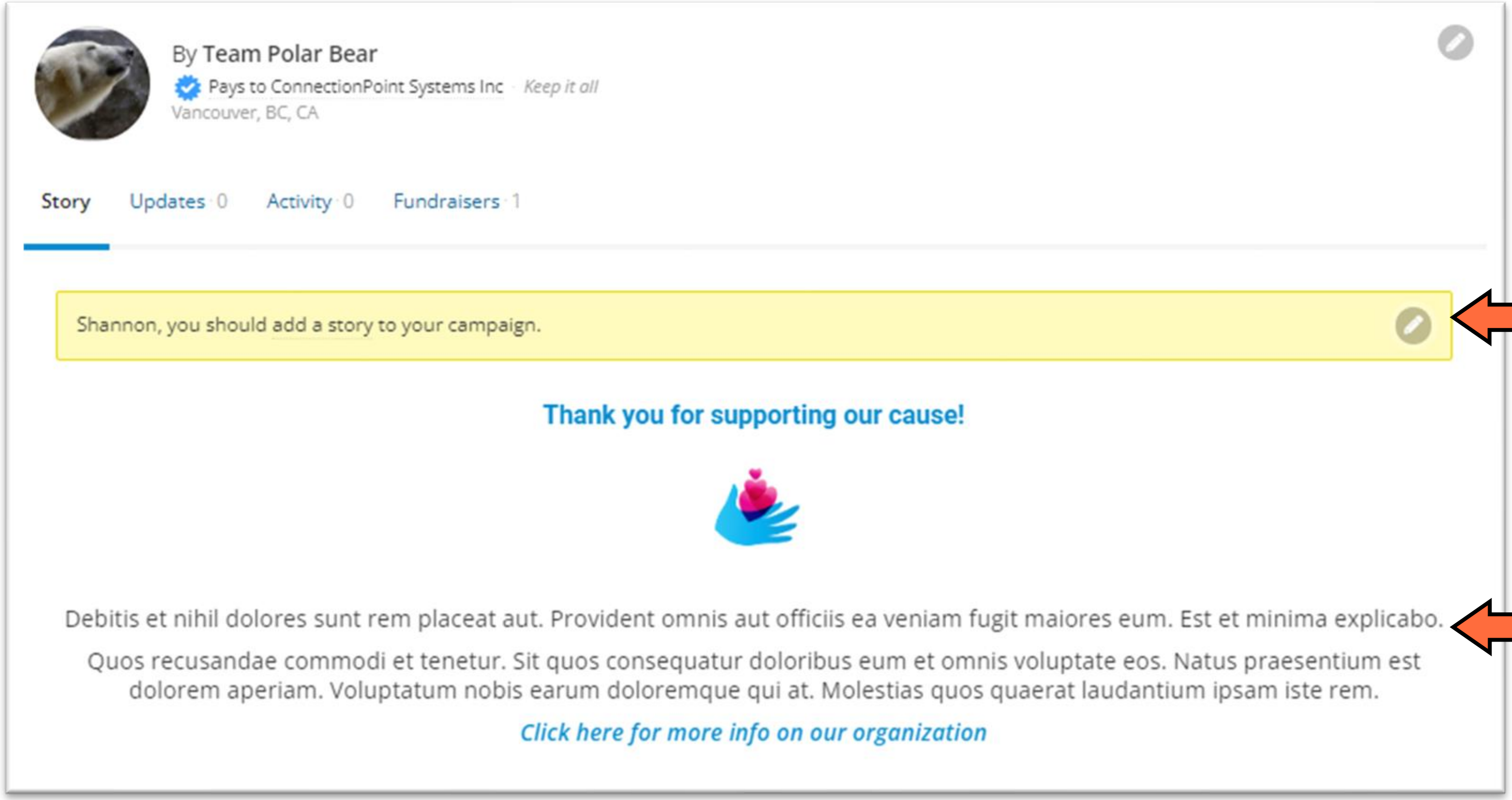


- If you are NOT allowing teams, all sub-campaign goals should be the same: the amount that must be raised to participate in the event and static vs dynamic is NOT applicable.
- Locking means the participant CANNOT CHANGE the sub-campaign goal. You can decide whether you want this feature or not.
- If you ARE allowing teams, then you may wish to select ‘Dynamic’ (dynamic = team member goal x number of team members). **Locking is recommended.**

TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/how-to-set-or-edit-the-sub-campaign-goal/

Sub-Campaign Set-Up

2. Write your sub-campaign story



Participant/Team story
(Participants & Teams can always add to their part of the story)

Sub-campaign story
(Set by organization and unchangeable by participant)

Sub-Campaign Set-Up

2. Write your sub-campaign story

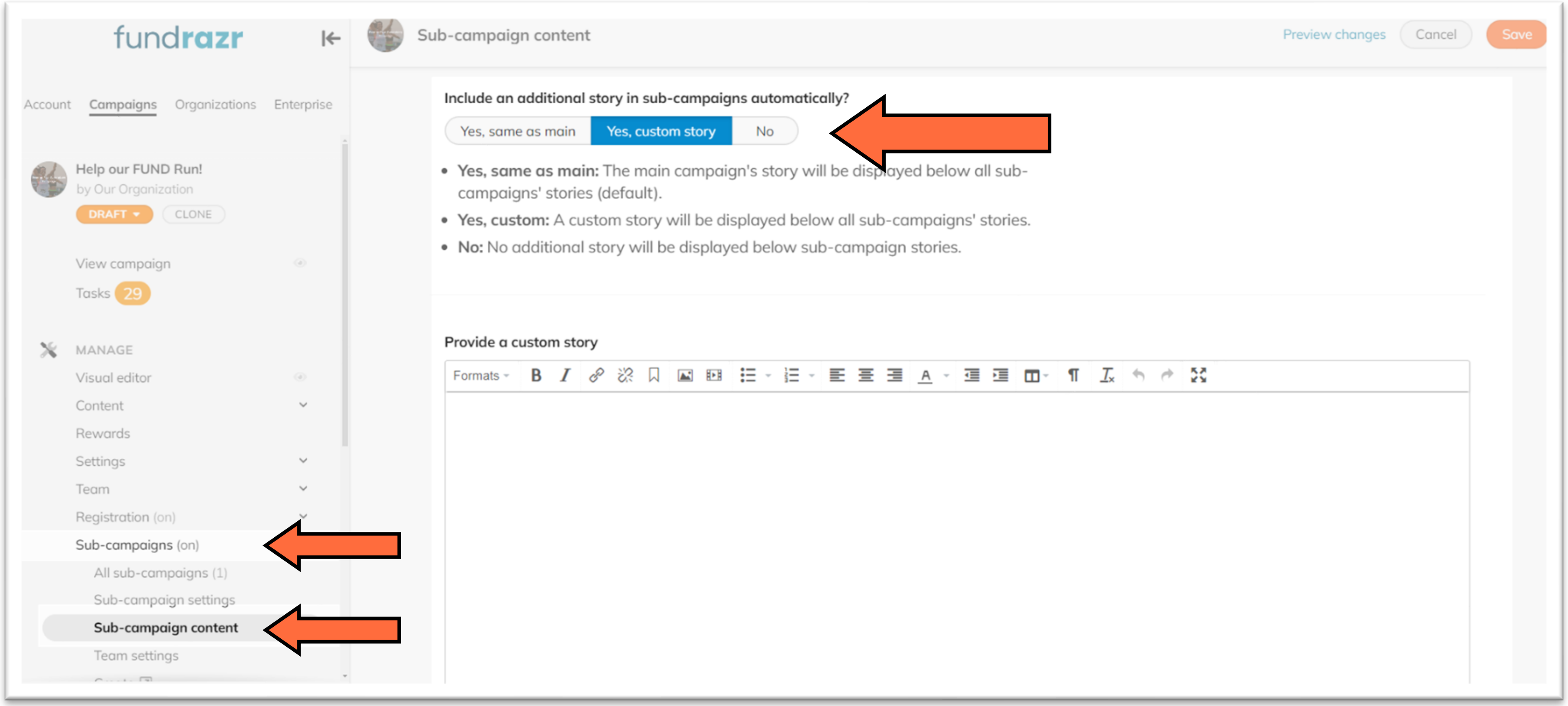
Your sub-campaign story is speaking to ***your donors.***

They want to know about the campaign itself and what they are helping to accomplish. This should be like any standard campaign. This article guides you through writing a fundraising campaign story:

https://connectionpoint.com/fundraiserhub/the-art-of-campaign-storytelling/

Sub-Campaign Set-Up

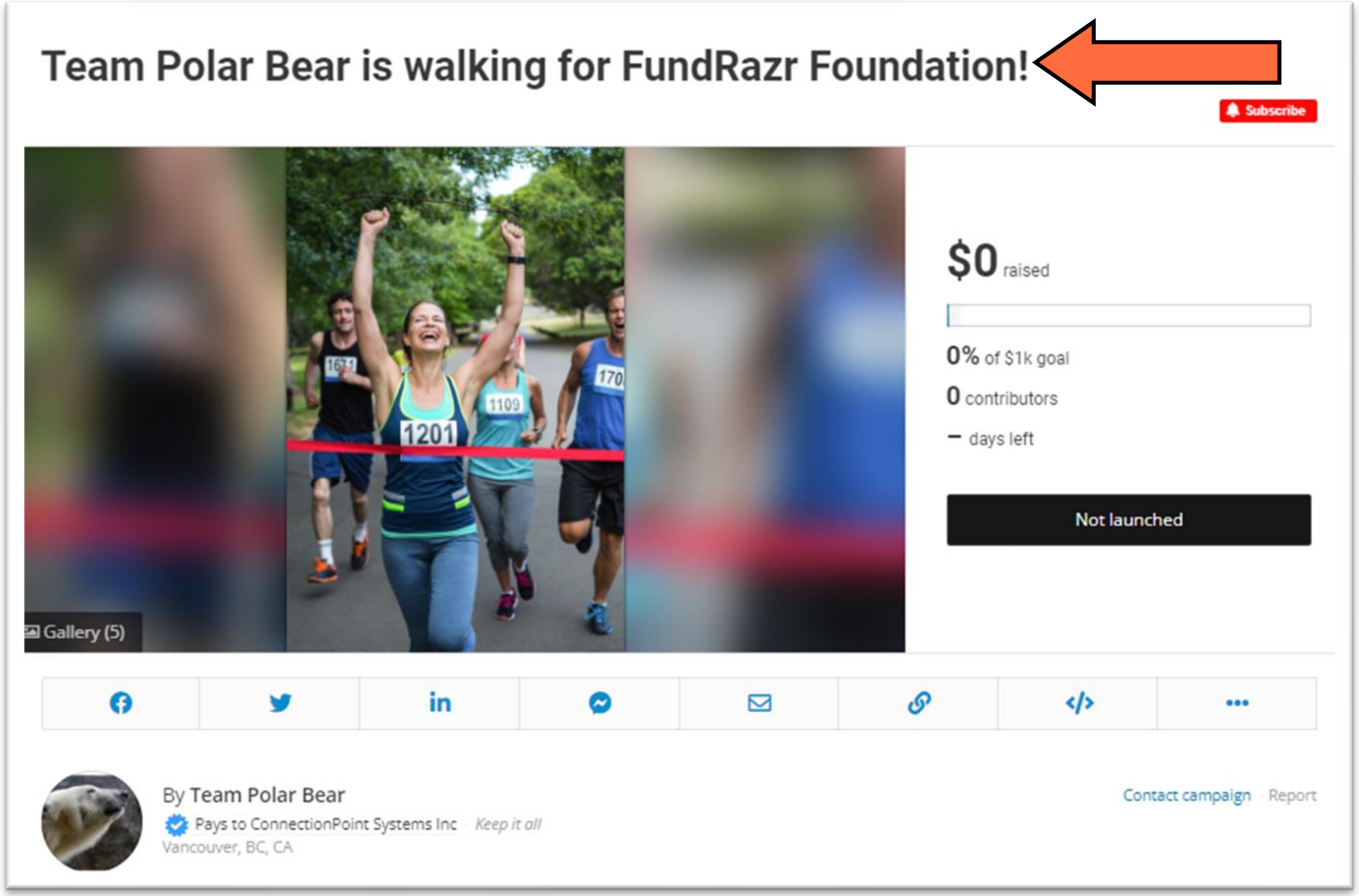
2. Write your sub-campaign story



TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/sub-campaign-stories-setting-and-editing-a-story-template/

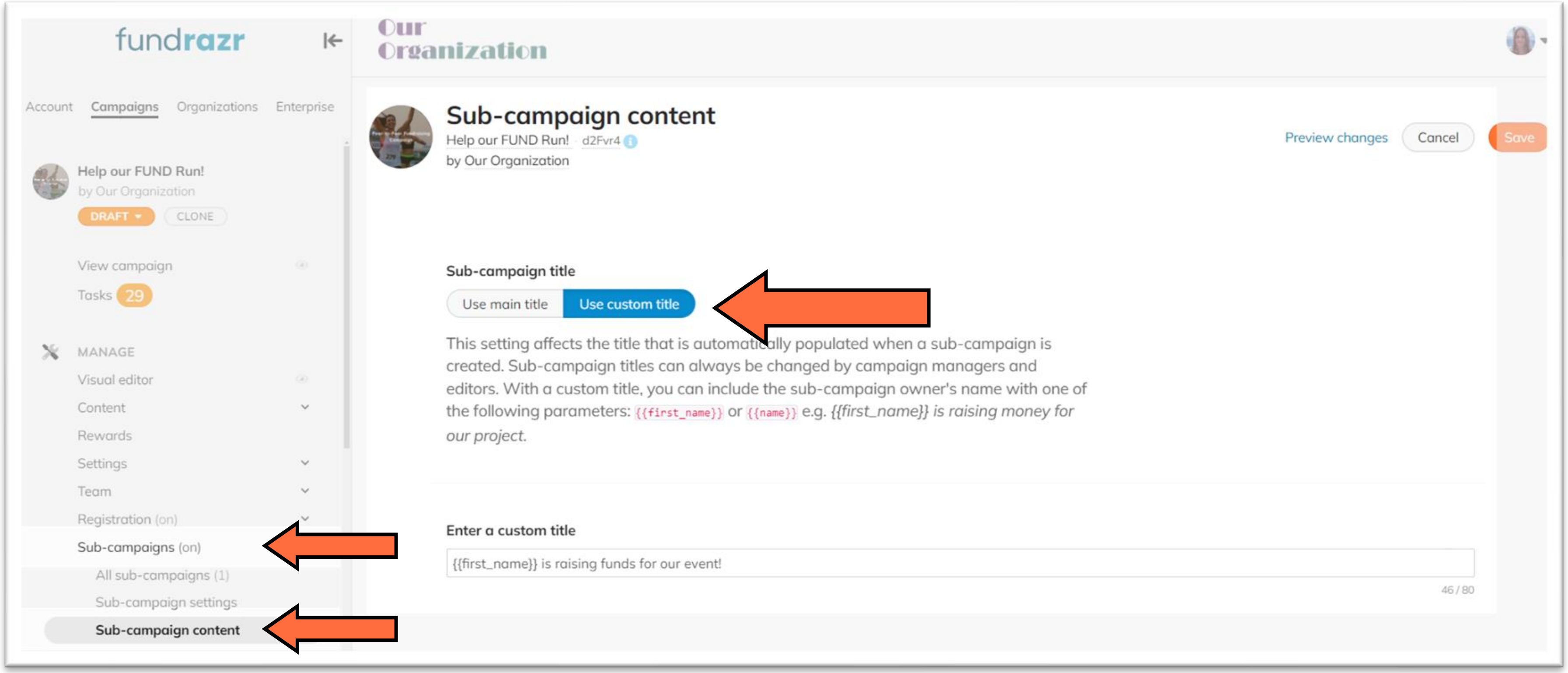
Sub-Campaign Set-Up

3. Set your sub-campaign title template



Sub-Campaign Set-Up

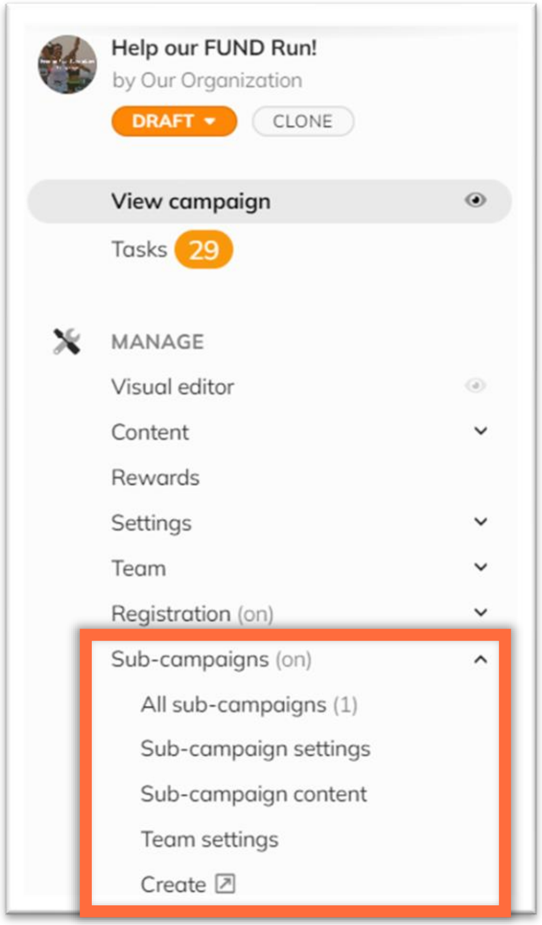
3. Set your sub-campaign title template



TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/how-to-set-a-sub-campaign-title-template/

Sub-Campaign Set-Up

4. Explore the sub-campaign menus and options



Registration

Part 1: Registration flow

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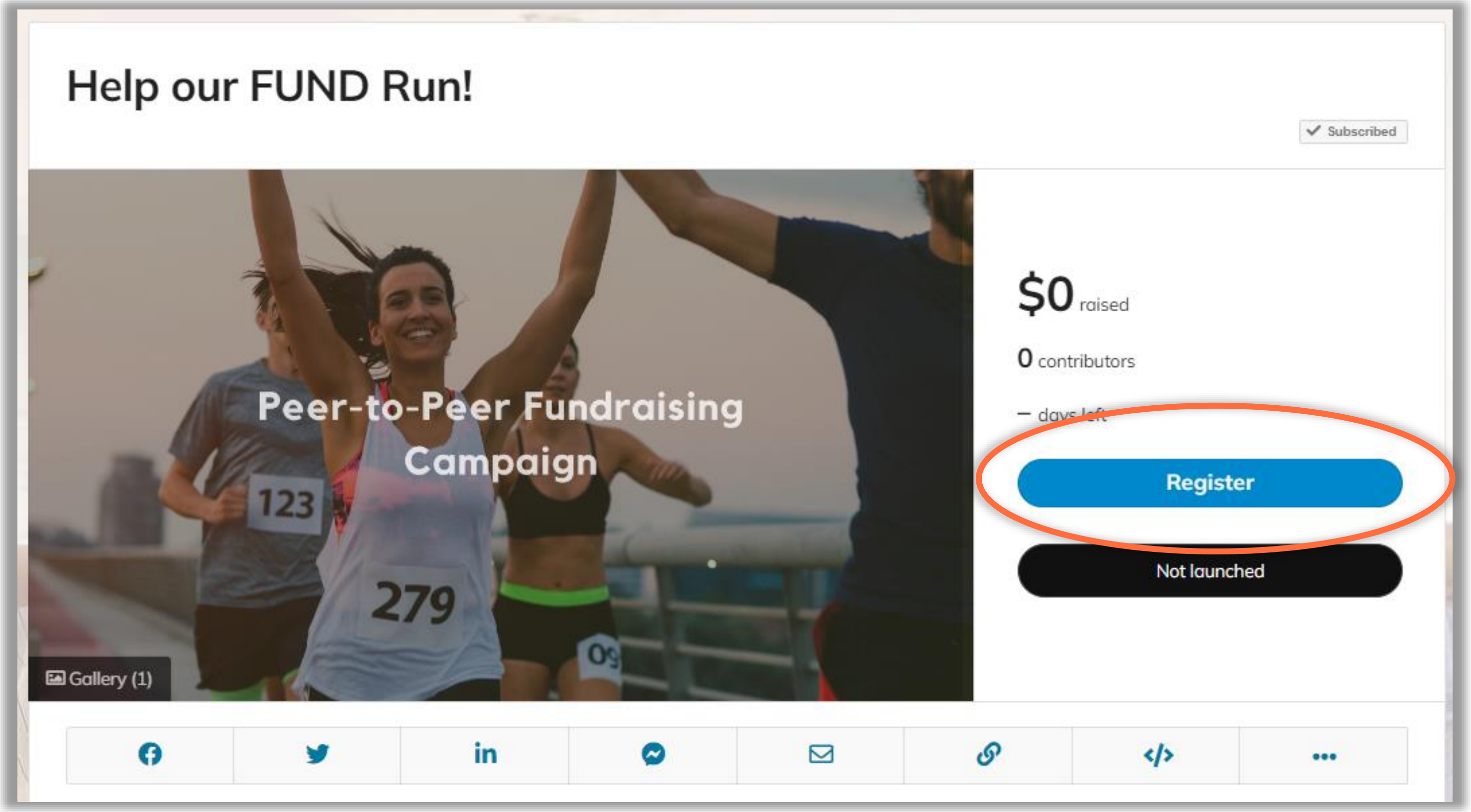
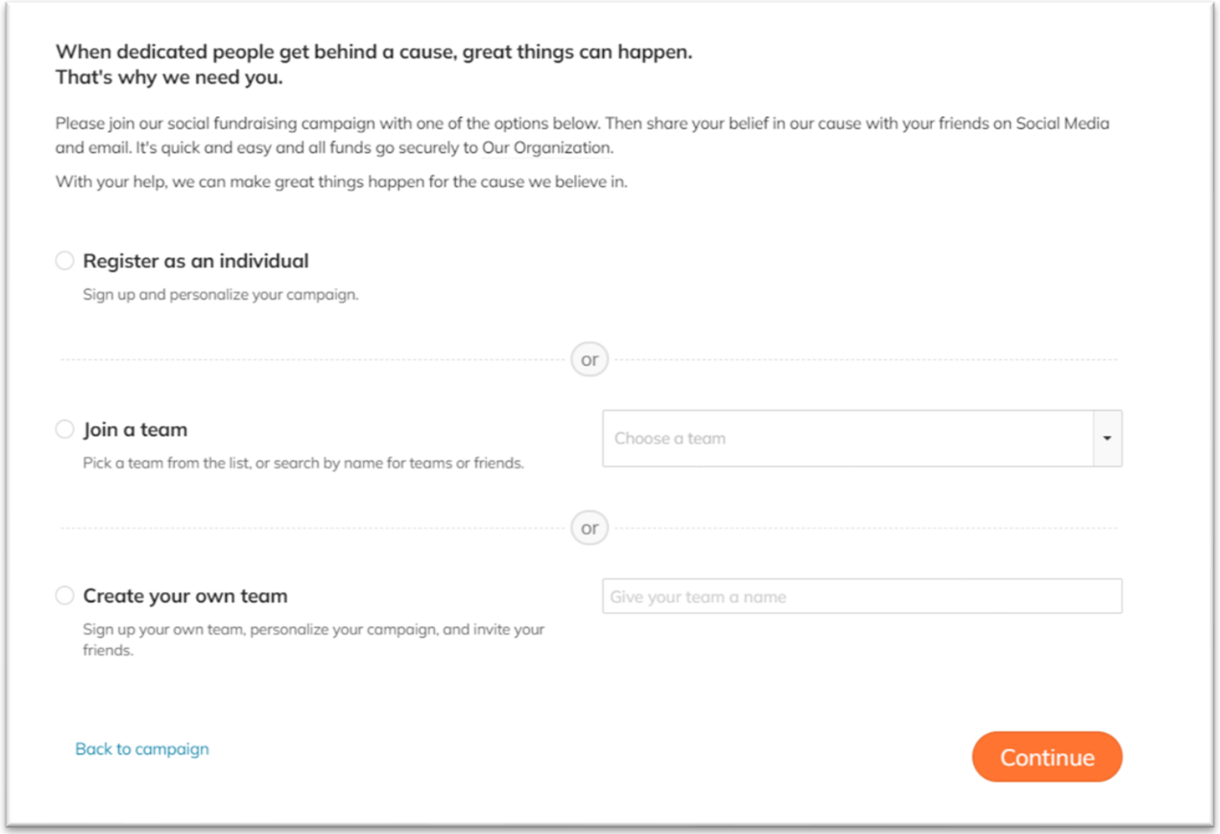
Registration

Standard registration flow (no customization)



Registration

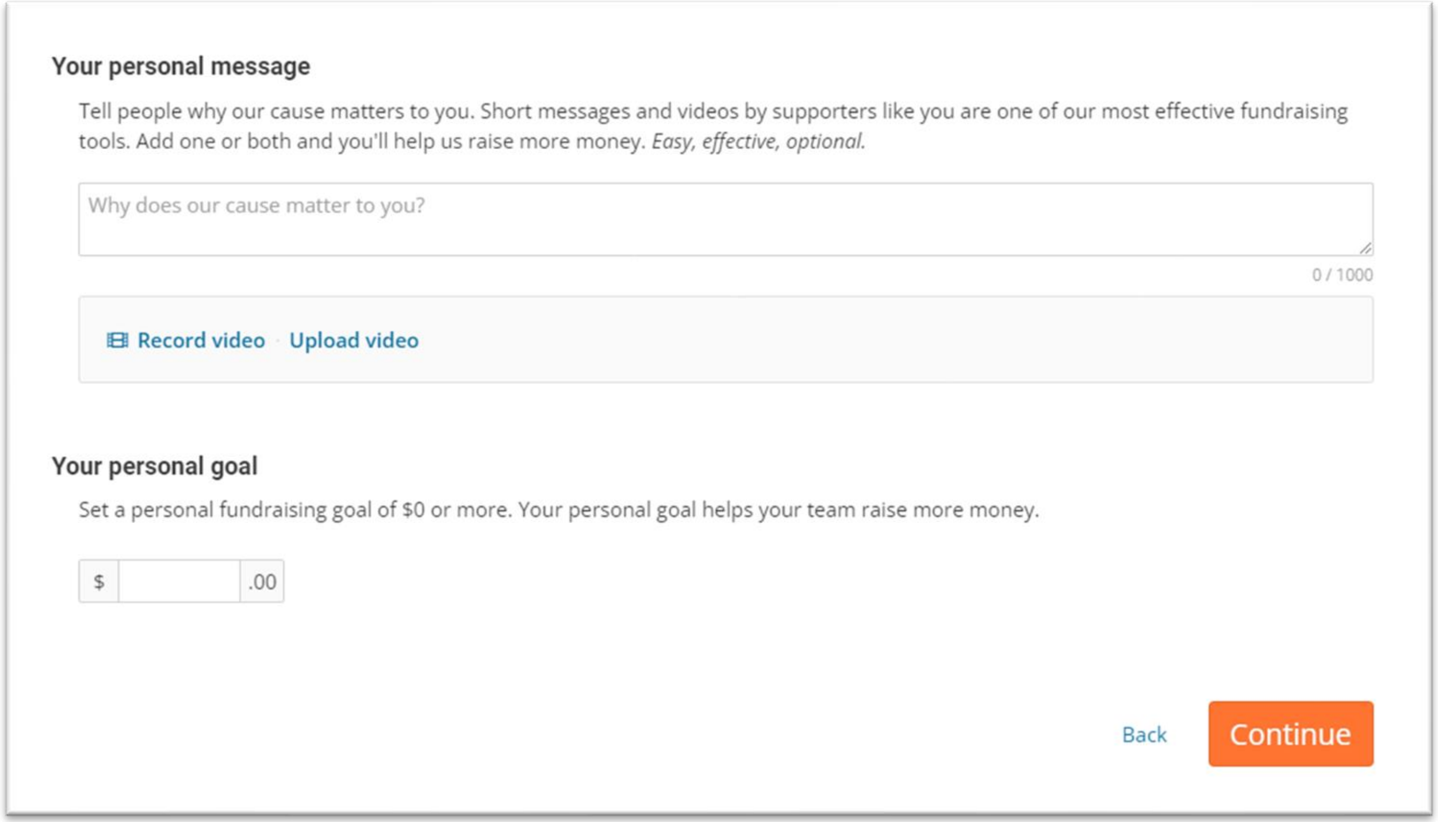
Standard registration flow (no customization)



Step 1 – Choose individual or campaign team

Registration

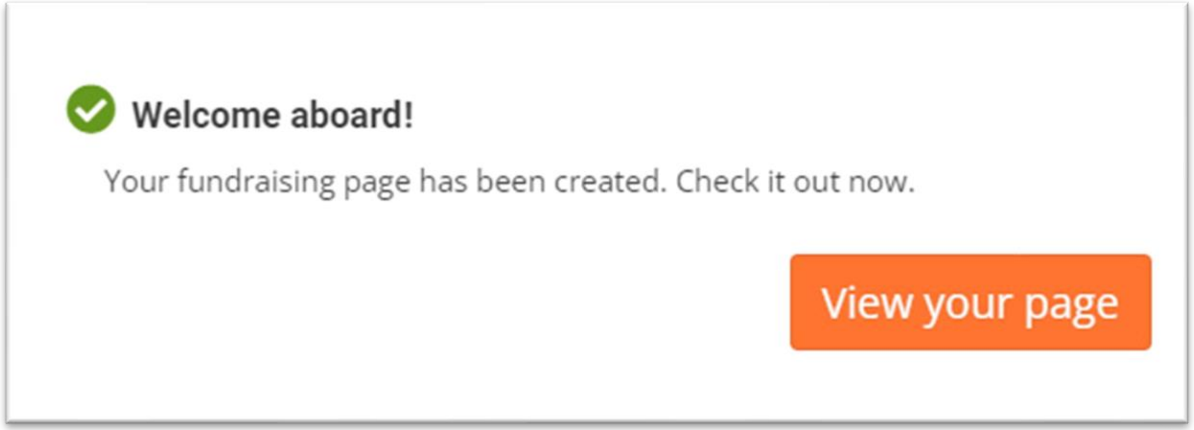
Standard registration flow (no customization)



Step 2 – Write/record a message and choose a goal

Registration

Standard registration flow (no customization)



Step 3: All done! The fundraiser can now view their fundraising page!

Registration

Part 2: Individuals vs teams

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Individuals vs Teams

What are the differences?

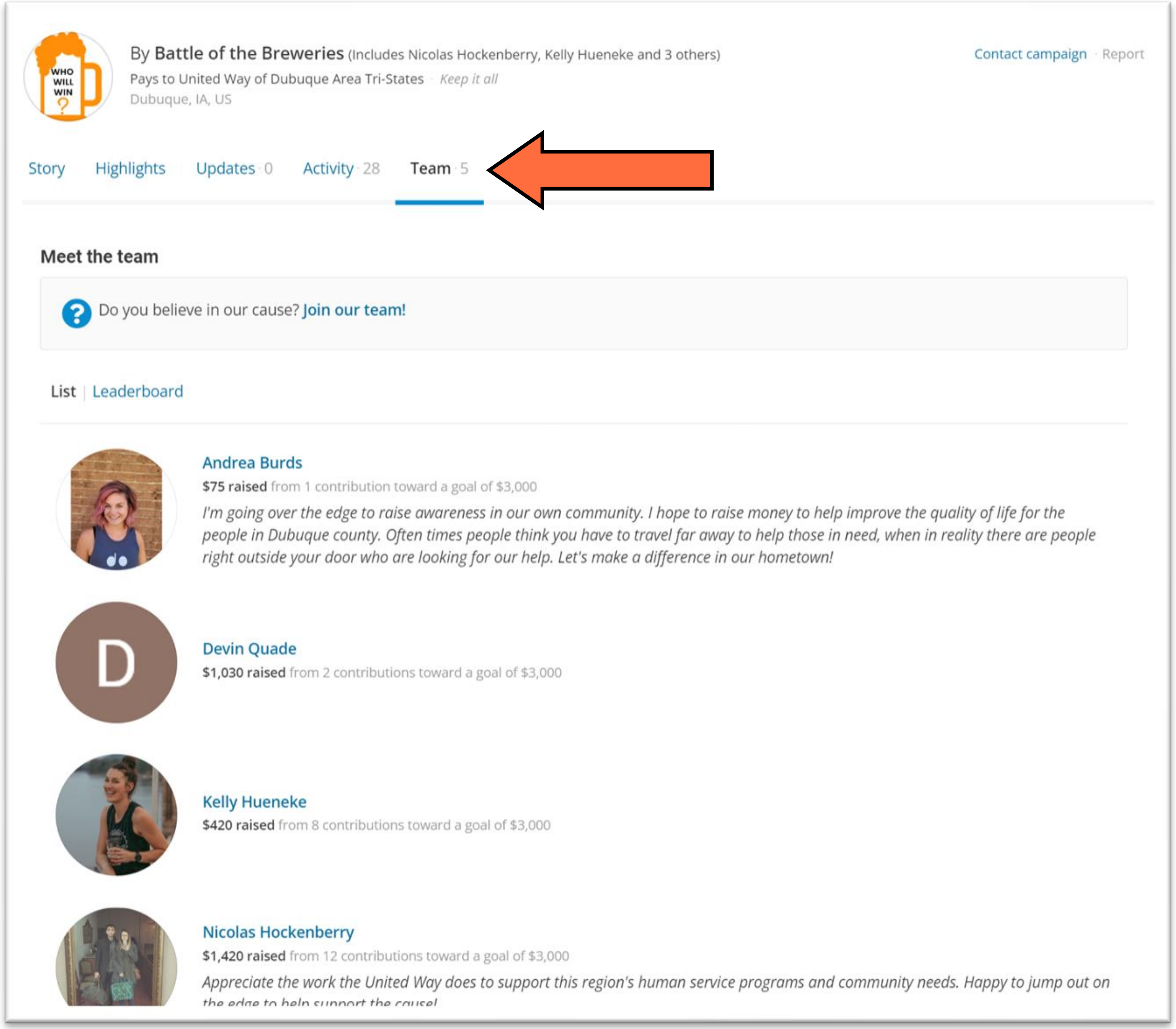
Individual campaigns

- Single fundraiser with one sub-campaign
- Aiming for their own sub-campaign goal (which matches their personal goal)
- All funds raised are attributed to that fundraiser

Team campaigns

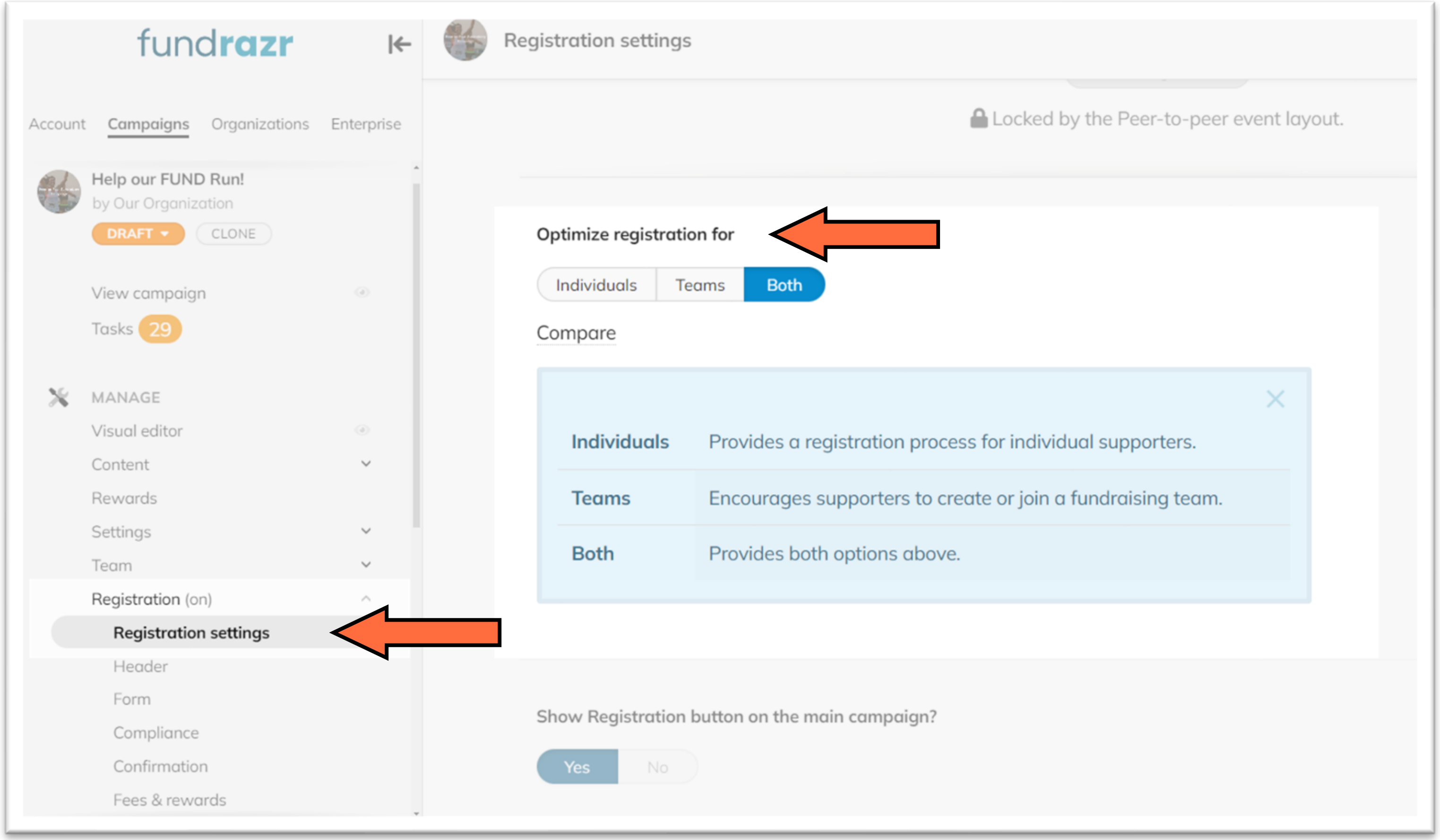
- Two or more fundraiser share ONE sub-campaign with ONE sub-campaign goal
- Team members each have a personal goal and funds raised can still be attributed to each individual fundraiser
- All funds accumulate toward collective sub-campaign total
- Story tabs include a 'Team' tab, which shows ***that team sub-campaign's*** team members and how much each has raised

Individuals vs Teams



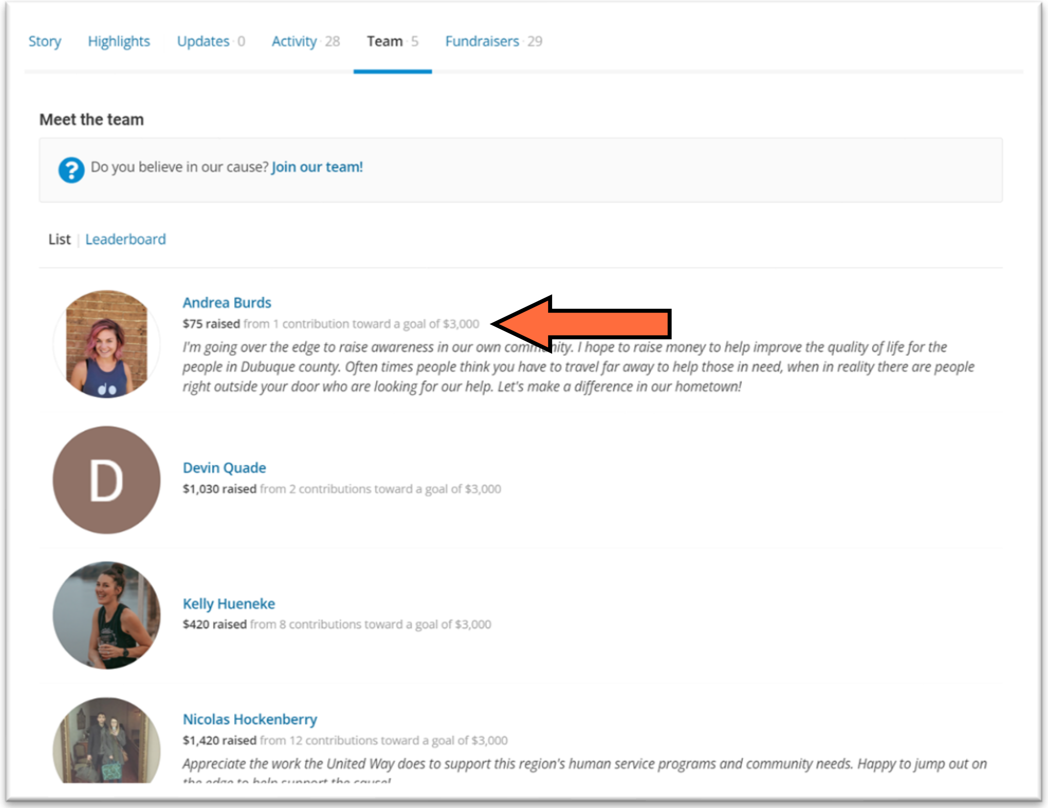
Individuals vs Teams

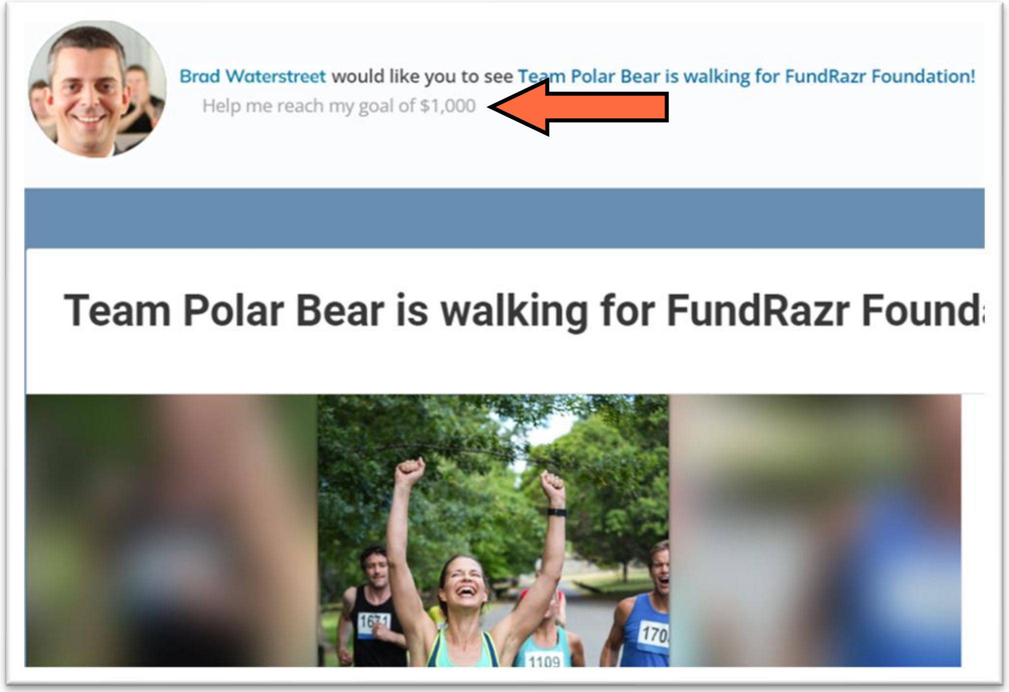
Choose what to allow



Individuals vs Teams

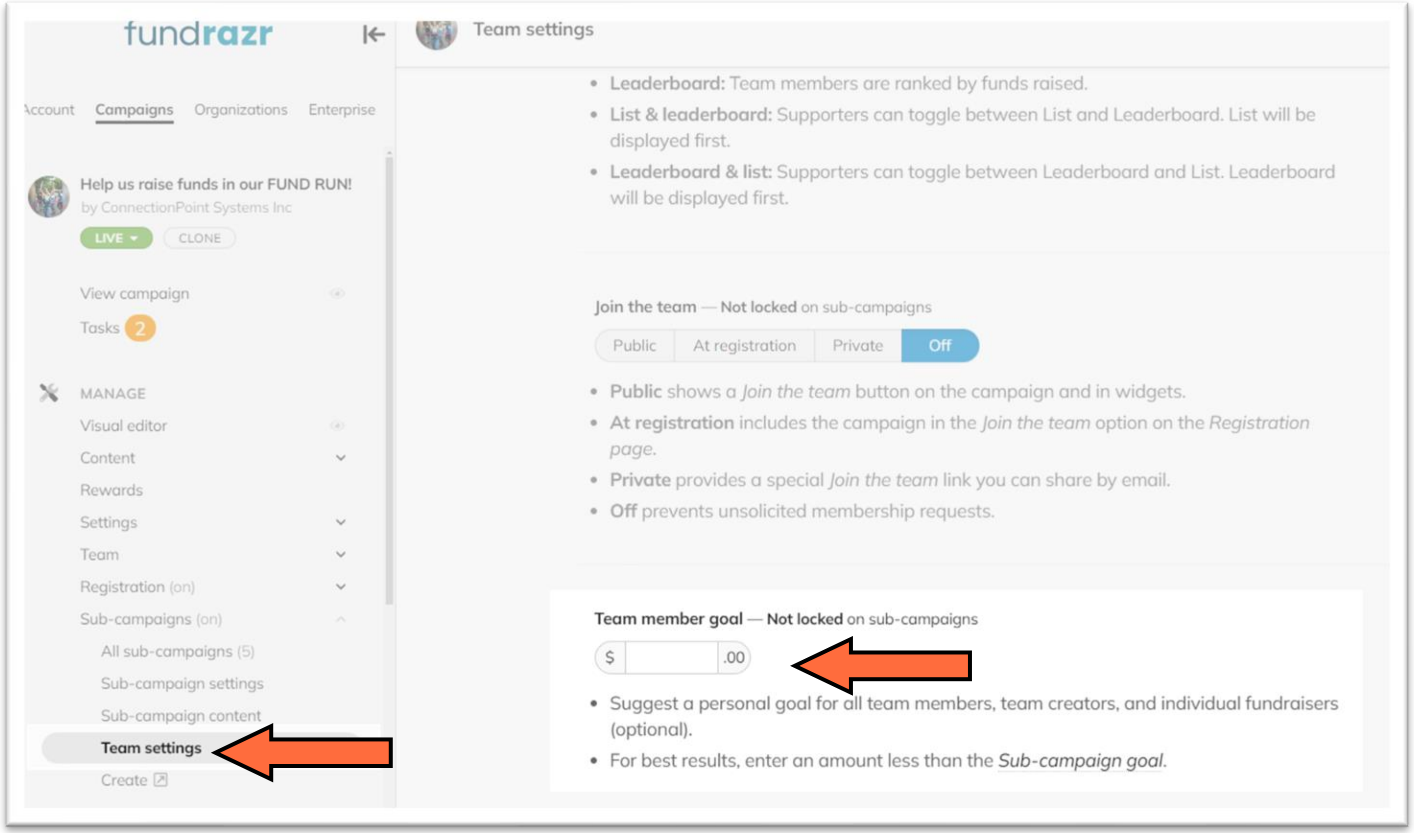
Team member goals – each individual fundraiser's person target





Individuals vs Teams

Setting team member goals – not necessary if you're not allowing teams!



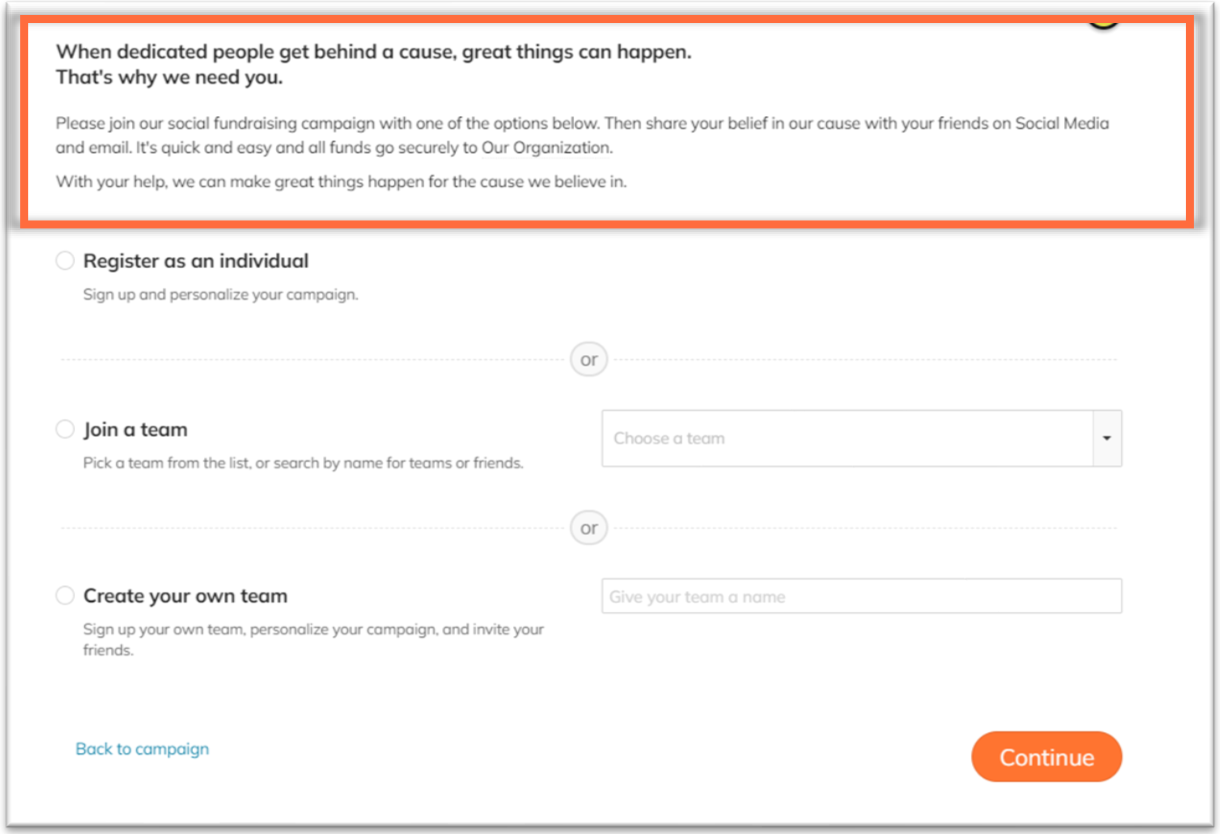
TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/how-to-set-or-edit-the-sub-campaign-team-member-goal/

Registration

Part 3: Customizing the registration flow

Customizing the Registration Flow

1. Header

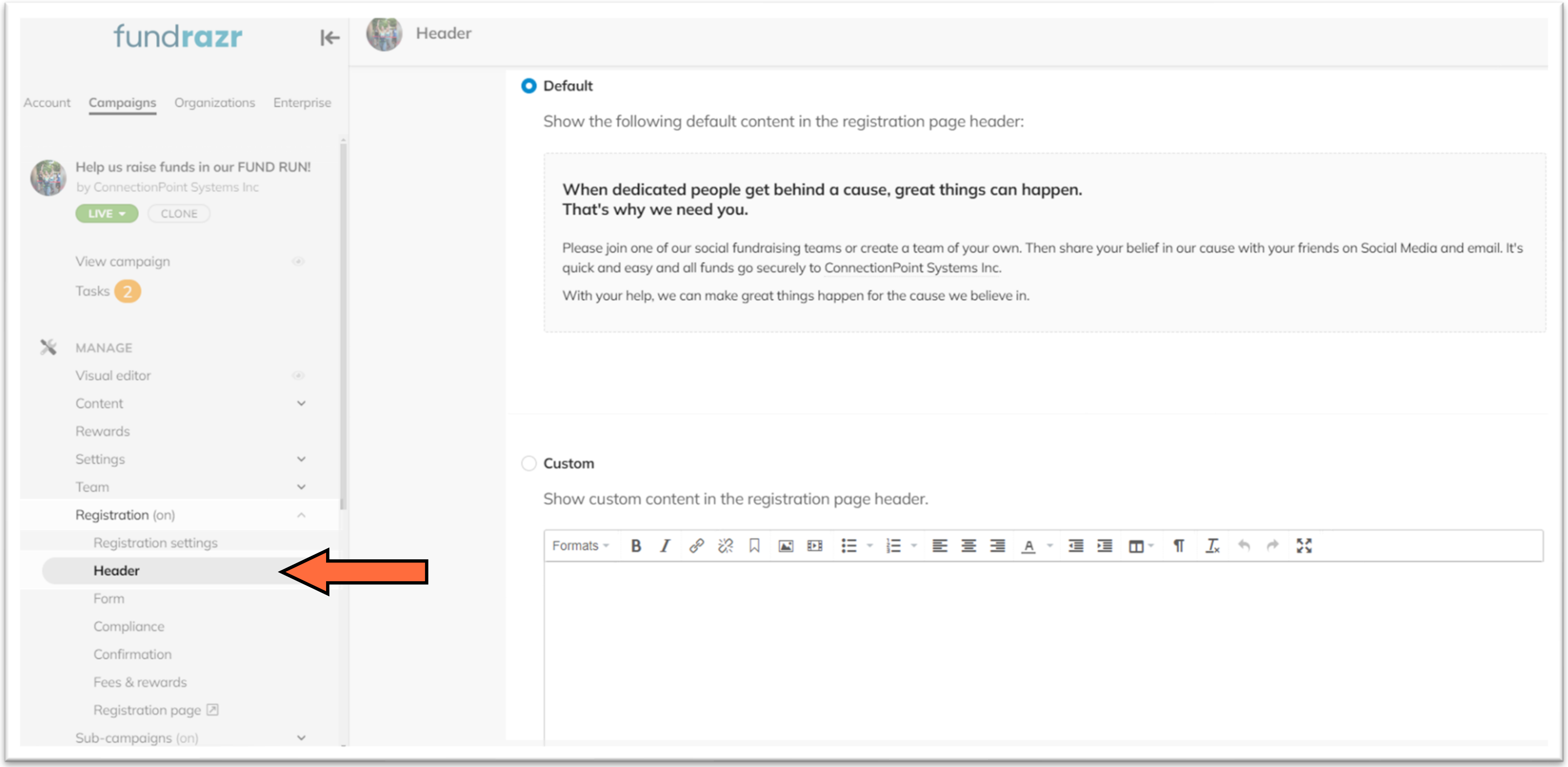


Consider entering:

- Organization logo
- Fundraising expectations
- Registration fee info
- Prizes/rewards for participants

Customizing the Registration Flow

1. Header



Customizing the Registration Flow

2. Creating a registration form

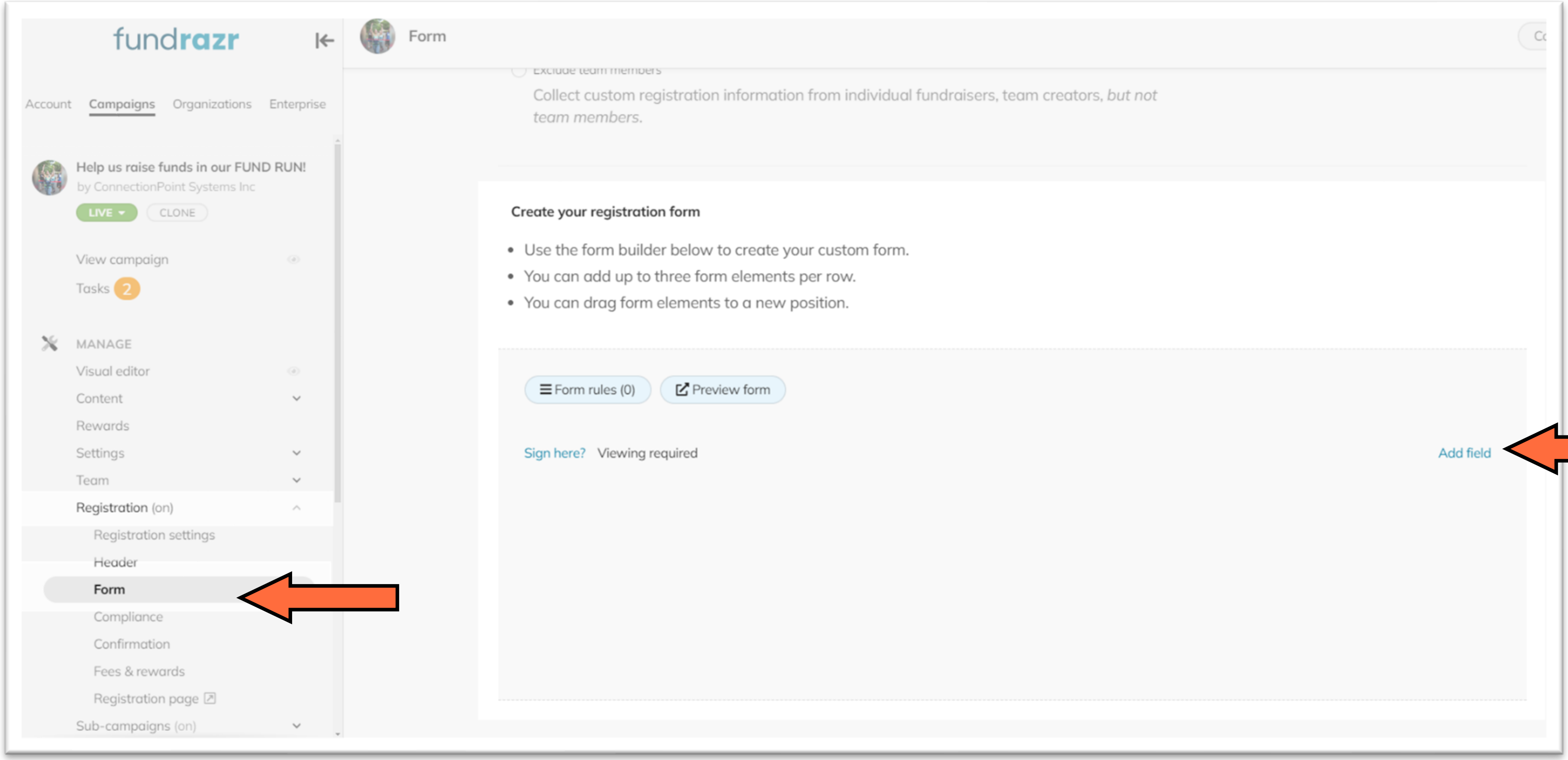
You'll have every registrant's **name** and **email address** as required by all ConnectionPoint platforms.

Request additional information by creating a **Registration Form**.

***Best practice** - do not ask for something you do not actually need. These create roadblocks and a would-be participant might change their mind if asked for too much personal information.

Customizing the Registration Flow

2. Creating a registration form

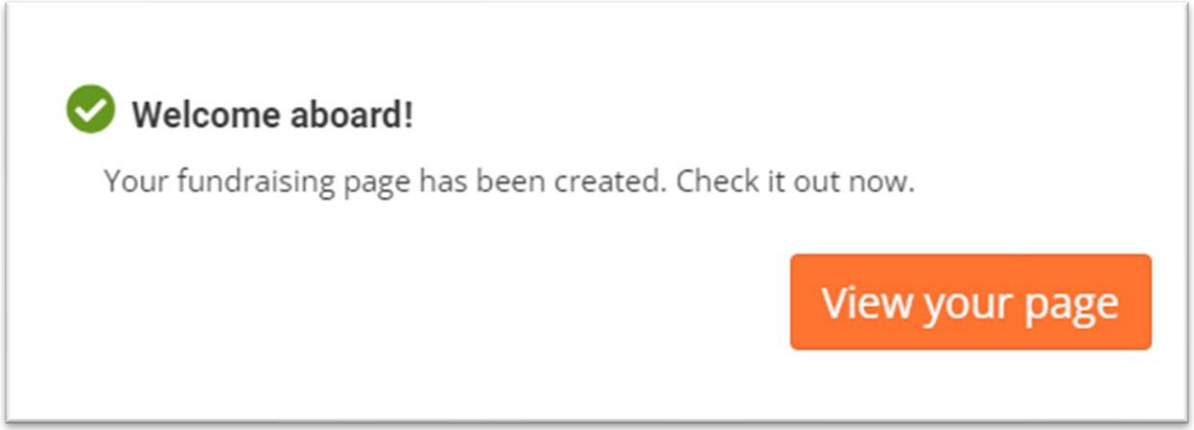


Start by clicking 'Add field'

TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/customizing-the-registration-form/

Customizing the Registration Flow

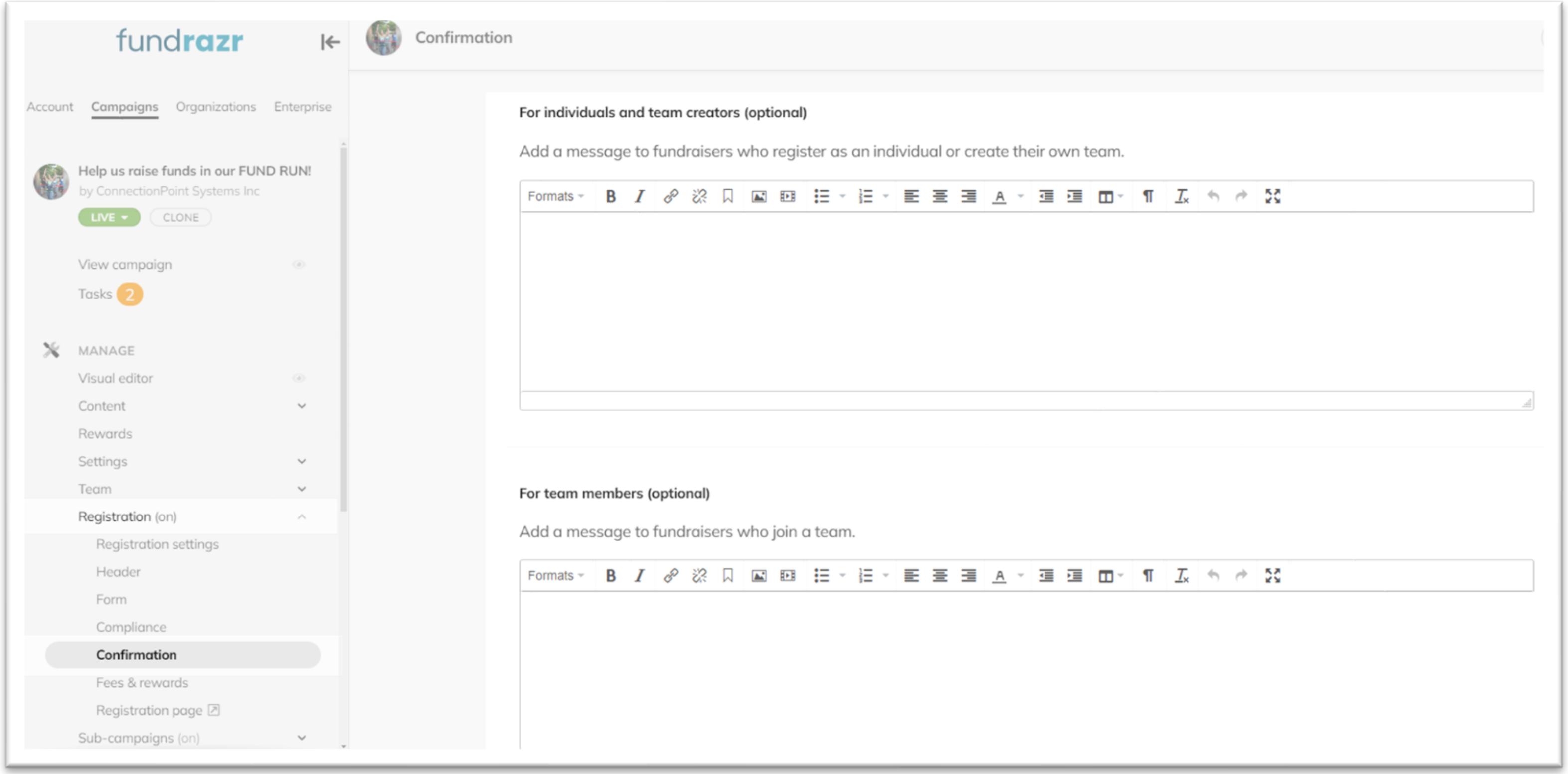
3. Customize the confirmation message



Editing isn't necessary, but you might want to include a picture of your logo, a thank you, and any other information you feel might be helpful before the participant pays their fees.

Customizing the Registration Flow

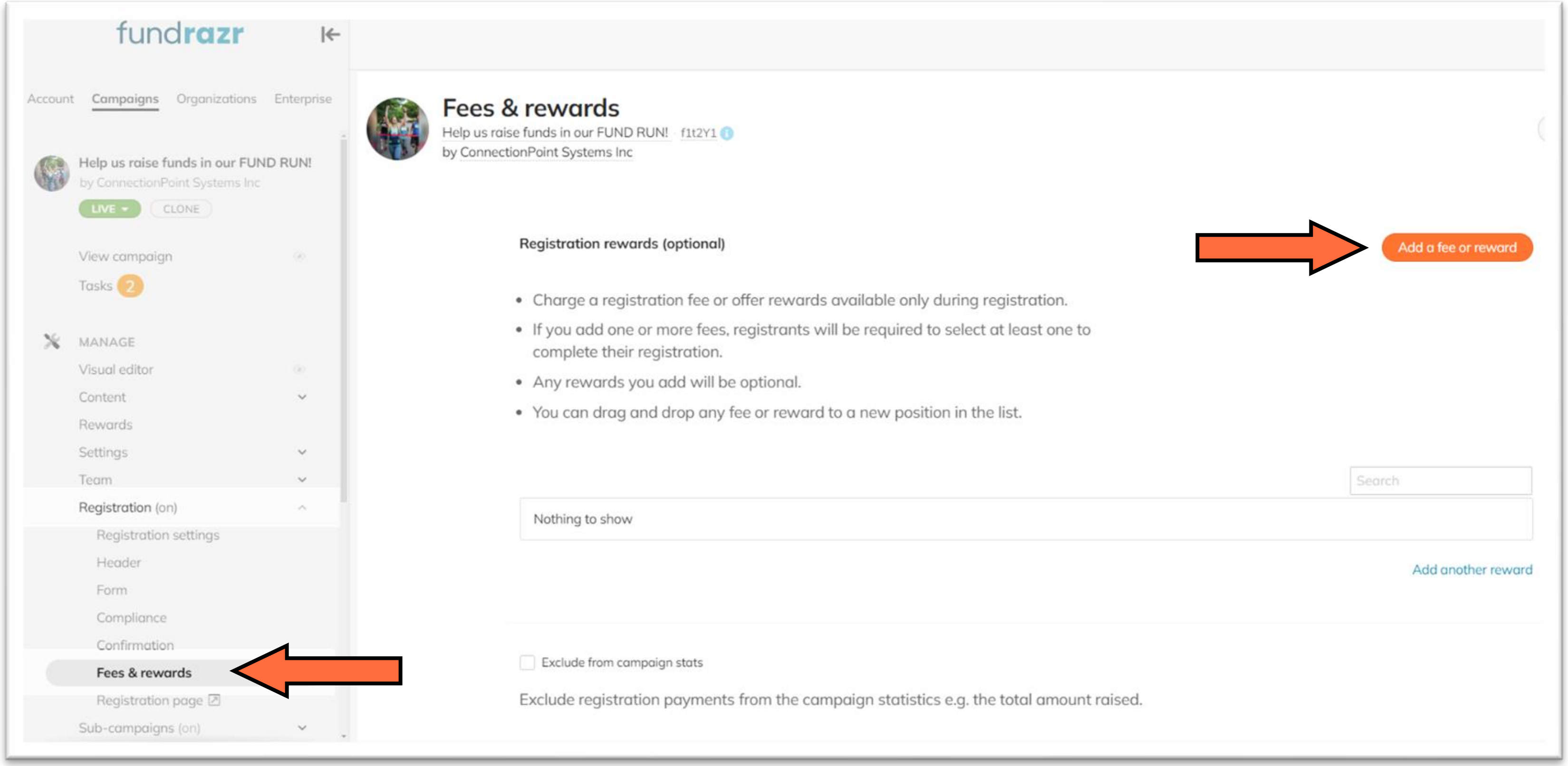
3. Customize the confirmation message



TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/what-is-the-confirmation-message-and-how-do-i-edit-it/

Customizing the Registration Flow

4. Add a registration fee or reward



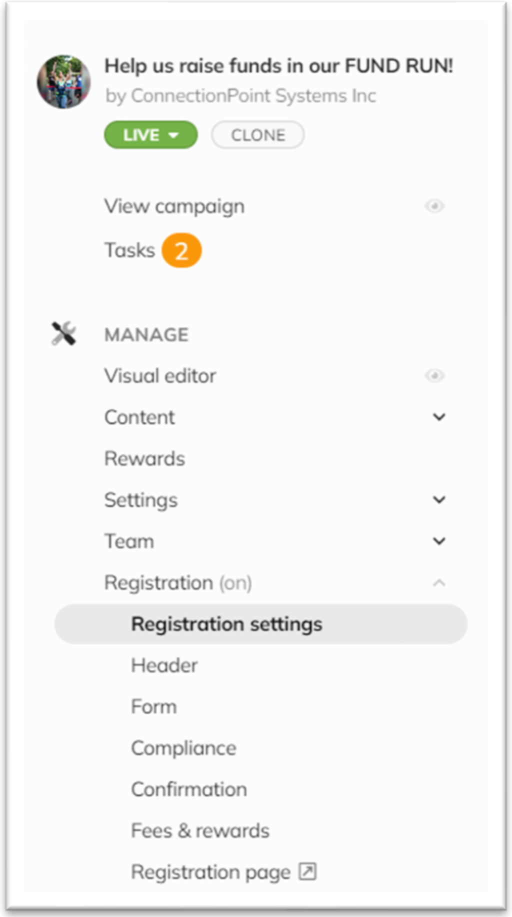
TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/registration-fees-rewards-how-to-add-edit-and-troubleshoot/

Customizing the Registration Flow

5. Explore other options and settings

Such as:

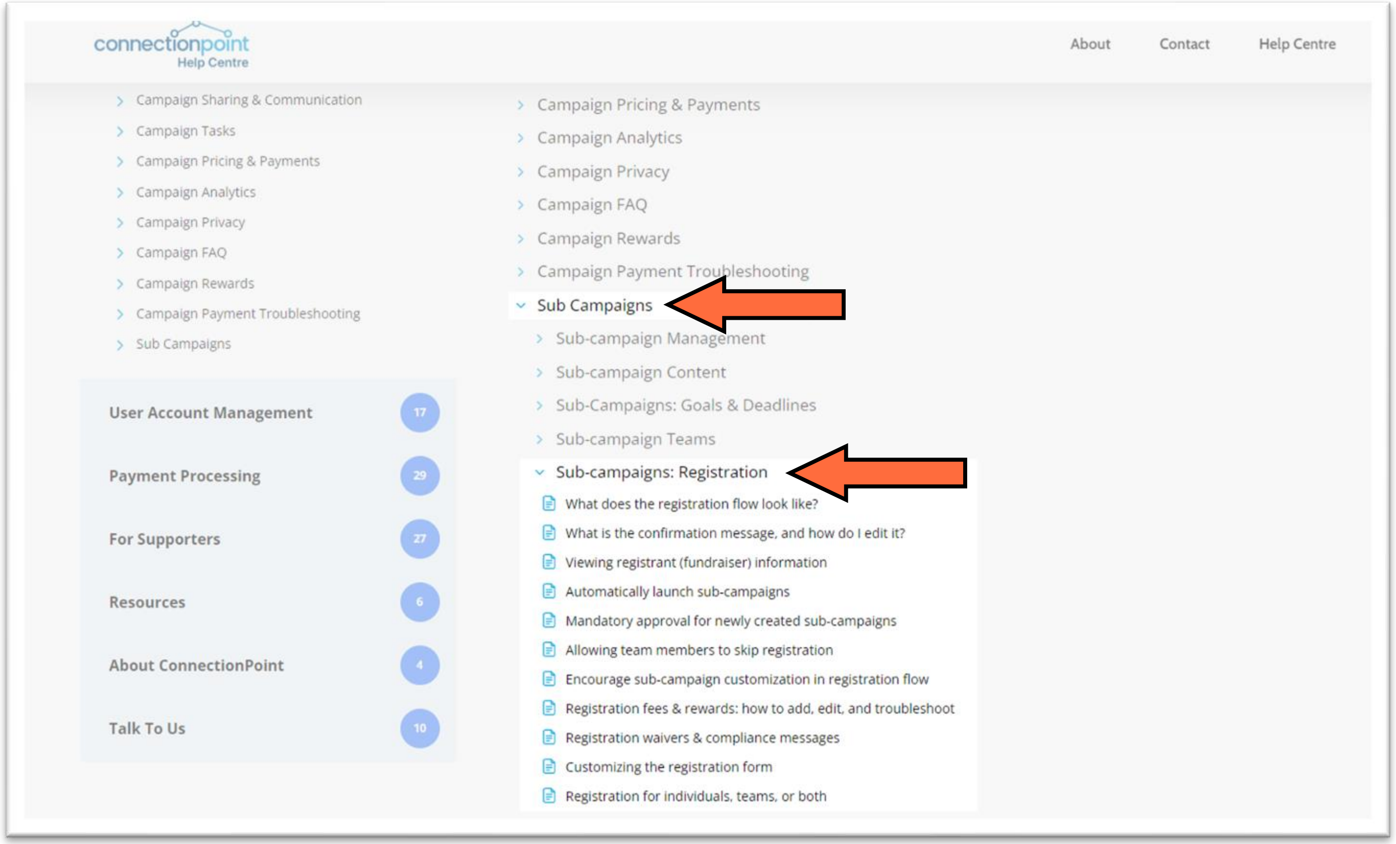
- Requiring admin approval before sub-campaigns go live.
- Name beneficiaries to specific sub-campaigns
- Bypass registration options
- Include a waiver or compliance option
- **and so much more**



Customizing the Registration Flow

5. Explore other options and settings

https://connectionpoint.com/help/help-category/campaign-management/



Campaign Management

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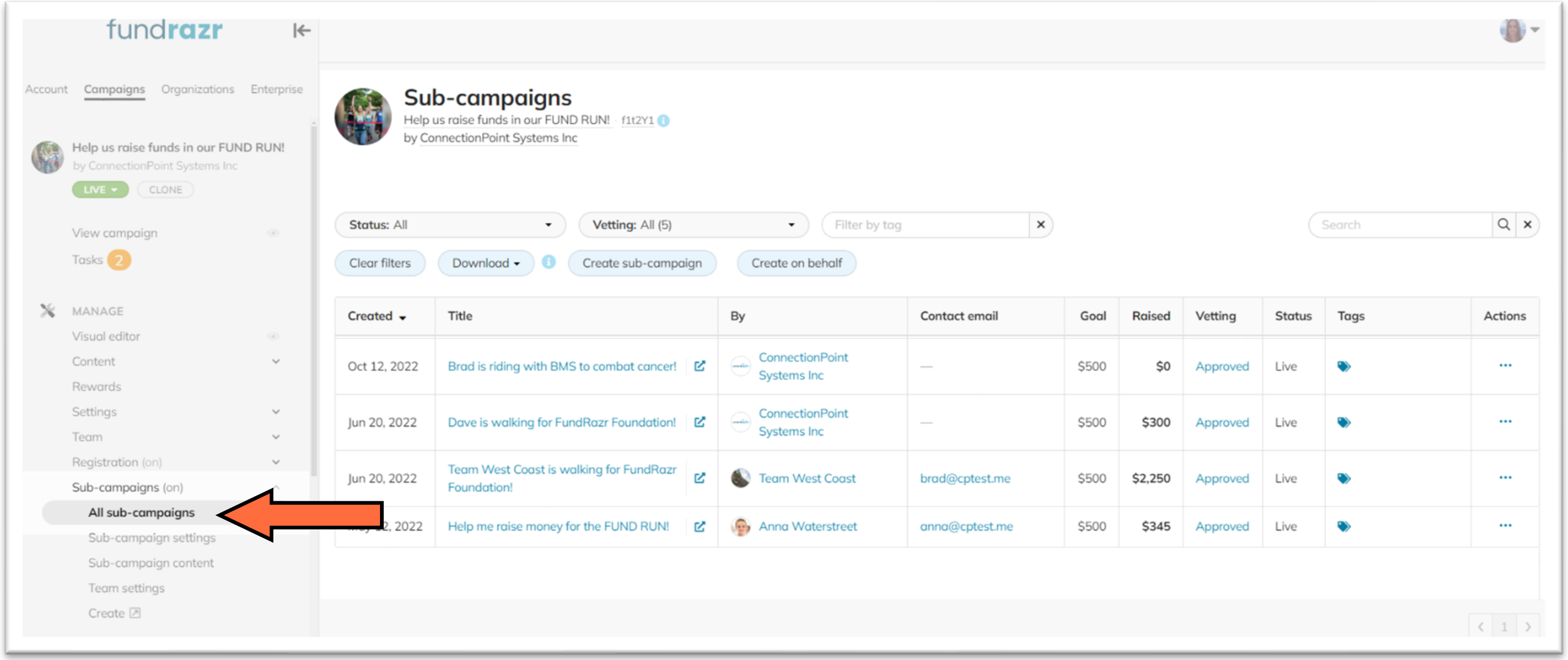
Campaign Management

1. Sub-campaign management

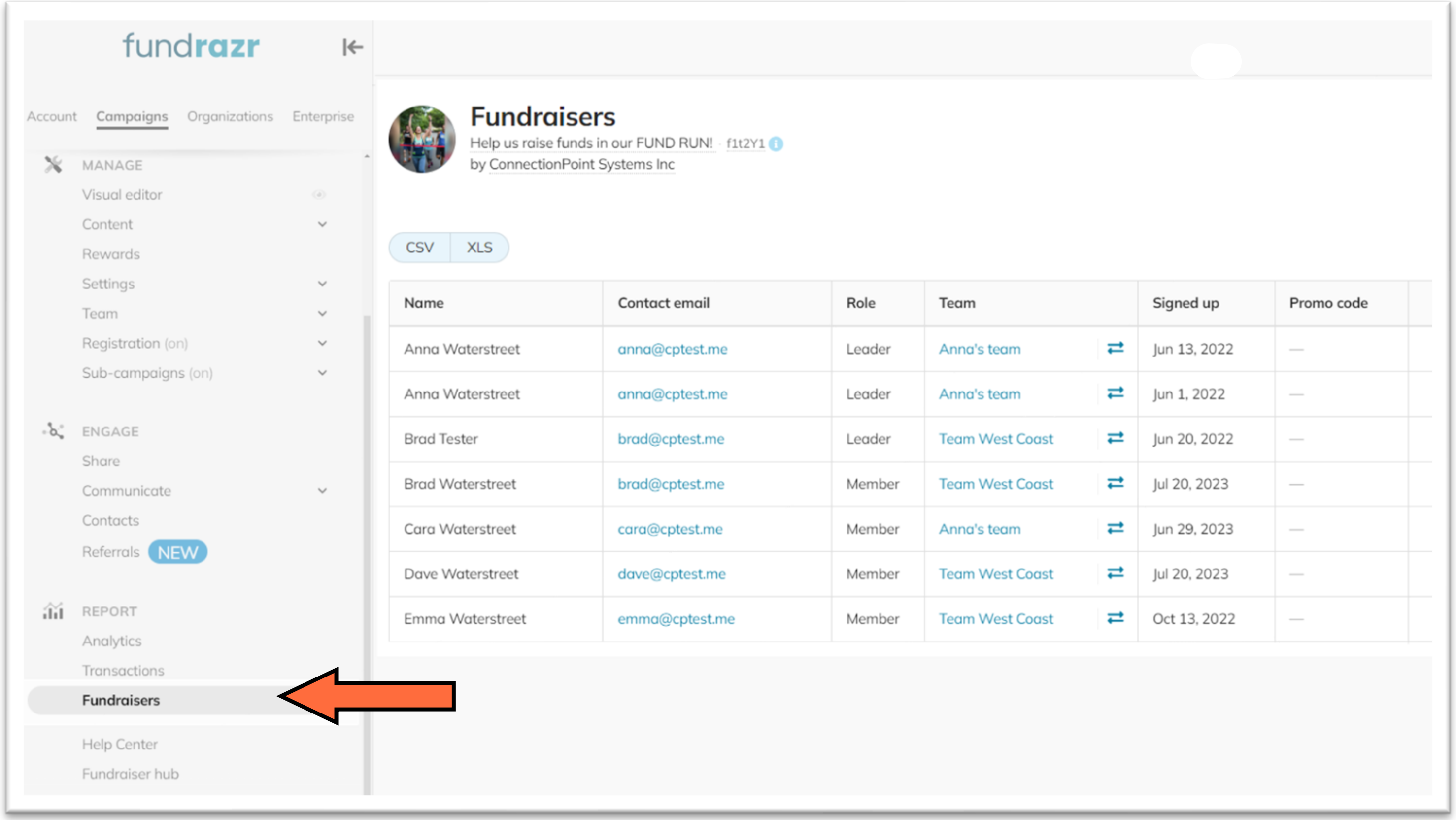


To view a list of sub-campaigns, approving or denying campaigns, deleting (if no funds attached), launching, pausing, restarting, and finishing campaigns.

Click anywhere on the line in the table to option up that sub-campaign's options.

Campaign Management

2. Fundraiser management

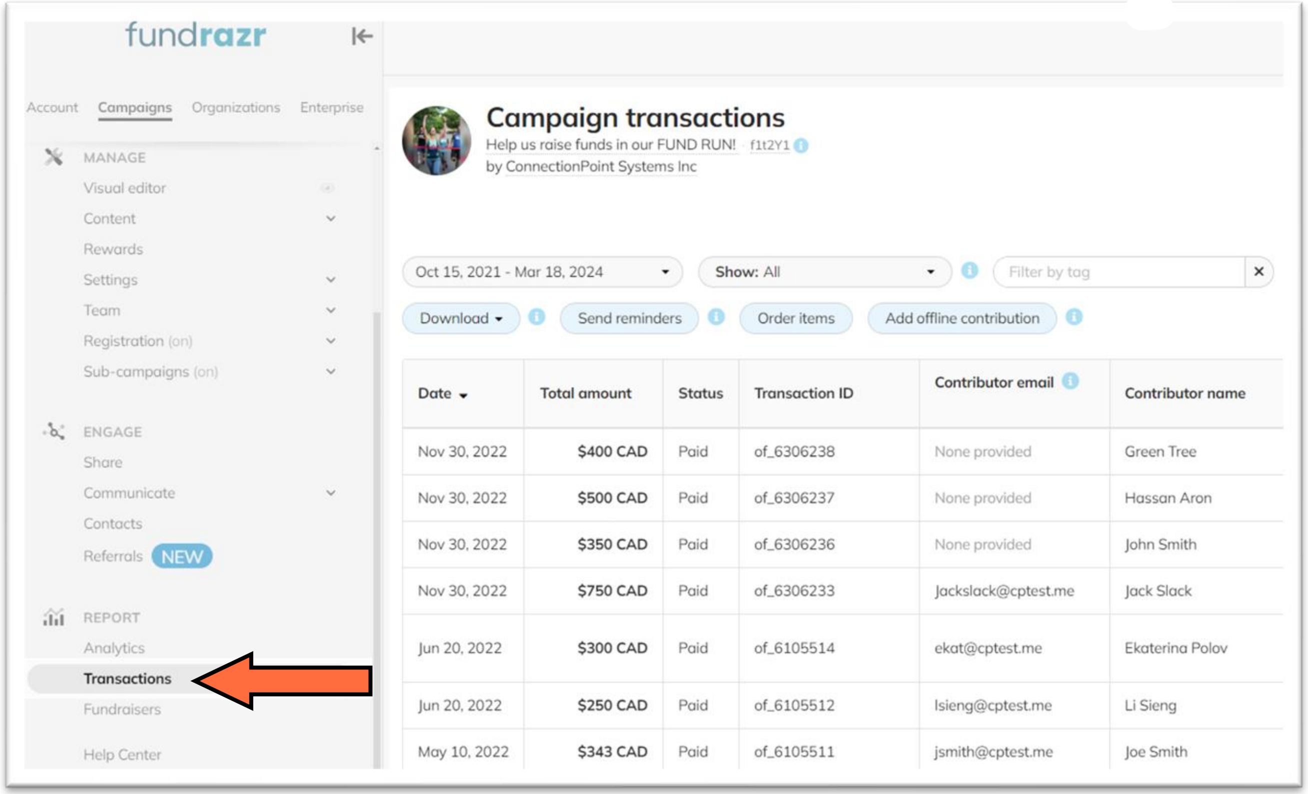


To view a list of all participants, switch teams, and view custom registration information (in downloaded files).

Click anywhere on the line in the table to option up that fundraiser's options.

Campaign Management

2. Contribution management

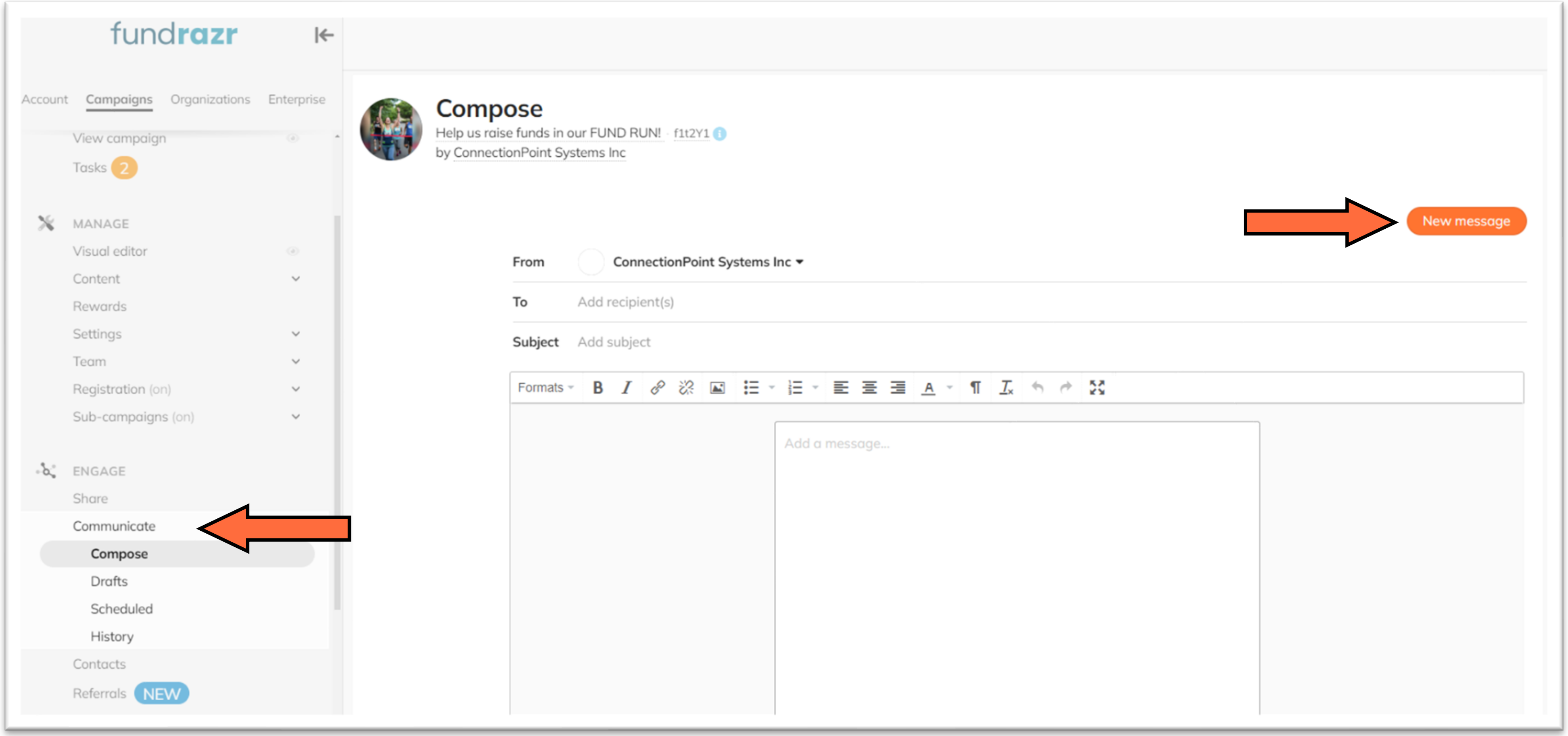


To view and update donor information and attribute or re-attribute contributions.

Click anywhere on the line in the table to option up that transaction’s options.

Communication

Communication



To message all fundraisers, donors, team members, or everyone!

TECHNICAL HELP ARTICLE: https://connectionpoint.com/help/docs/communication-centre-user-guide/

Resources

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Resources

HELP CENTER (Technical platform help): https://connectionpoint.com/help

FUNDRAISER HUB (Campaign strategy help): https://connectionpoint.com/fundraiserhub/

PLATFORM SUPPORT: support@connectionpoint.com (any platform)

THANKS!

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