Campaign Strategy Workbook

For organizations and individuals running campaigns for a cause

FUNDRAISER HUB by connectionpoint

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Scope of work

In the table below, write down the basic points for each item. Not all may be applicable to you and your project. For detailed information on each point, refer to the Campaign Strategy Toolkit on the Fundraiser HUB.

Campaign overview	
Timeline	
Sharing channels	
Key messages	
Assets	
Fundraising tactics	
Analytics	
Budget	
Roles & responsibilites	
Risk Management	
Approvals & sign-offs	

Project costs

Your project costs help determine an accurate goal.

Item	Projected cost
Project costs	
-	
-	
-	
-	
Marketing materials	
-	
-	
-	
-	
Campaign Fees	
-	
Buffer/Contingency costs	
-	

TOTAL _____

Defining your audience

If your current audience cannot help fulfill your need, you'll need to look at building your crowd for this campaign.

	Social Media	Email	Other
Example	Facebook = 500 Instagram = 350 LinkedIn = 100 Twitter = 150 TikTok = 150 *To weed out likely duplicates, we recommend using only the highest of these numbers. In this example, Facebook = 500	Put in the number of emails you have in your contact lists (e.g. from MailChimp, Keela, Constant Contact, or any other CRM). Example: 2500 emails in list. Note: the quality of your list matters! If this is a list you have been gathering over a few years with little to no communication, it's possible the recipients will not remember who you are and report you as spam, thereby hurting your reputation! Go through your email list and clean it up to ensure a positive experience for all involved.	Any other means of recurring communication with your network.
Number			

Story Outline

Write down points in each column to help you draft your final story.

Opening line	
Problem	
Solution	
Identify the gap	
Outline 'Units of impact'	
Quid Pro Quo	
Calls to action	

Updates

You can even prep your updates right in the platform and schedule them for the right date!

Update content idea	Posting date

Campaign Timeline

Add as many rows as you need and keep this page handy to remind you of important dates.

Due date(s)	Task	Owner
	Create initial campaign layout	
	Complete video/picture edits and upload	
	Complete campaign story	
	Pre-launch/launch campaign	
	First social media share	
	First update	
	Additional social media shares	
	Change campaign to 'Finished' once goal or deadline is reached.	

Campaign Checklist

Follow the checklist below as you create your campaign to ensure you haven't forgotten anything.

- ☐ Create your campaign. Don't focus on getting everything perfect at this stage, you can edit everything before you launch. Note: you cannot change between AON or KIA after the campaign has been created.

- ☐ Write down your launch date here and work towards that date:

  _____

- ☐ Select the right layout for your campaign.

- ☐ Craft your campaign's story.

- ☐ Insert any Reward items (if applicable)

- ☐ Upload your campaign video, plus any additional photos or videos to make your page visually appealing.

- ☐ Set up sub-campaigns (if applicable)

- ☐ Ensure your payment processor (PayPal and/or Stripe) is connected to your account.

- ☐ Customise your email receipt that will be sent to your supporters when their contribution is completed.

- ☐ On launch day, double-check everything on your campaign, and hit "Launch".