



Crowdfunding Campaign

Planning Accelerator

This planning guide is designed to help you refine your vision, identify your team, discover your audience and refine your message.

Part 1: The Why Focus Your Vision

A) What is the problem you want to solve in the world?

Example: Our robotics club needs to stay alive, and maybe even expand to include new members.

B) What is the impact created when someone supports this effort?

Example: Support will help us keep our 25 year old club alive, provide more opportunities for great events in our community and will help us with the charitable work our club does in the community.

C) What do you want to accomplish through this campaign?

Check all that apply:

- | | |
|--|---|
| <input type="checkbox"/> Build a community of followers | <input type="checkbox"/> Tell your story more effectively |
| <input type="checkbox"/> Market your org / group / project | <input type="checkbox"/> Centralize your communications |
| <input type="checkbox"/> Crowdfund ideas & feedback | <input type="checkbox"/> Presell products / rewards |
| <input type="checkbox"/> Attract sponsors / collaborators | <input type="checkbox"/> Collect funding from my network |

Part 2: The Who Identify Your Community

- D) Campaigns led by **teams** are easier and more effective.
List 3+ other people who would make good **team members** for this campaign and **why**.

Now, *personally* reach out to each of the potential Team Members you identified.
Share the vision of the campaign and ASK them to join you in this planning!

- E) Who will be **most** effected by this campaign?

- F) Who else will **benefit** from this campaign?

Example: community members who attend our events, local electronics suppliers, people effected by our charitable work, businesses that host our events, our bookkeeper and graphic designer.

Pro Tip:

Crowd Fundraising is about building and connecting **your community**.
Money always comes after you build **connections**.

G) Who cares about this campaign enough to be an **advocate?**

Review D & E above and identify possible collaborators:

H) Who will give money to this campaign and why?

Example: Current and past robotics team members - because they want the team to survive. Family & close friends of current team members - because they may want to support their friends/family. Community members interested in robotics - if they know their donations are creating an important impact in the world.

I) What could you offer as rewards to motivate people to donate their money?

Example: Our thanks and gratitude; attendance to our Fall Battlebot Smackdown event; sponsorship opportunities for businesses; Membership in the club(?)

Part 3: The What Tell The Story

Now that you have clarity on your vision, team and audience, let's focus on what you want people to do and the impact their support will have!

J) In 40 characters or less, give your campaign a name.

Example: Thrill All Humans: Save the Robotics Club!

K) In 140 characters or less, summarize what you want people to do and the impact that will have in the world.

Example: Help us save the Fort Collins Robotics club! Bring the gift of robotics to a new generation and change the lives of people in our community!

L) Now, let's outline the full story. (300-500 words max.)

Here's a useful template to get you started:

- **Define a character** or characters. 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 is the problem?
- **Inspire Action.** "Together, we can overcome [the conflict] and help [the characters] do x, y, z."
- **Make The Ask.** Tell the audience what to do. "Donate now and reach out to three other people you know will support it."
- **Show the impact.** Tell the audience what impact is made in the world because of their support. "Because of your support, these children will finally be able to..."
- **Leave them wanting more.** Let the audience know this is an on-going story and that they should keep checking back for updates.

Write your outline in a word processor or on a blank sheet of paper!

Pro Tip:

It's hard asking your community for money, but crowd fundraising isn't begging.

You are positioning yourself as an expert to solve a problem in the world, and inviting others to be a part of that process with you!

Part 4: The Funds Campaign Goal & Stretch Goals

Realistic fundraising goals can make or break a great campaign. Let's work on setting a goal you can knock out of the park!

Exercise 1: A Stroll Down Possibility Lane

Let's do some thinking about your goal, and the resources you have ready to support it:



Exercise 2: By the Numbers

Let's do some basic calculations based on industry averages to learn what kind of **marketing effort** you'll need to reach a specific goal:

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 email 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 about 10-20% of donations come from users who find out about the campaign from other sources ("the crowd").

5. Reflect on the significance of box 4.

If the number of people you need to actively drive to your campaign page is beyond your marketing ability, it's a good indicator that you need to **lower your goal** or seek a marketing professional that can help you attain the traffic needed to reach your goal.

Don't be discouraged if your initial goal is too high. There are lots of ways to get there, and that's what we are focusing on in the next exercise!



*Make sure you use the [Campaign Marketing Accelerator](#) workbook!

Exercise 3: Fractional Fundraising and Stretch Goals

The best way to be successful is to work toward a goal you absolutely know you can reach, and then use that momentum to catapult into larger goals!

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

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

NEED TO HAVE:	
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N) List additional things you **WANT** to have that go beyond your core objectives:

WANT TO HAVE:	
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O) Go nuts: List things you **WISH** to have assuming “anything is possible”:

WISH TO HAVE:	
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P) Now, go back and add estimated **\$ values** into the right column for these items. Think about the **impact** each of these items would have in the world.

- Can you break these objectives into two or more campaigns? (Fractional fundraising).
- Set your fundraising **GOAL** to account for your **NEED TO HAVE** items.
- Build your **STRETCH GOALS** to account for your want & wish to have items, clearly describing to donors the impact each will cause.

“Our goal is to raise \$3,000 so we can cause A, B & C. Our first Stretch Goal is \$5,000 so we can cause D & E. If we can reach our final Stretch Goal of \$15,000, the impact will be enormous and we can do F, G, H & I!”

Part 5: The When Time is on your side

Intelligent timelines can help you do more, quicker & easier.

Pro Tip: Shorter is better. Short timelines leverage **urgency** to motivate donors. 30 Days is the gold standard for great campaigns.

M) Enter your key milestones/dates on the timeline below:

1) Think about important dates / events that may coincide with your campaign. Include things like meet-ups, parties, fundraisers, travel, holidays etc:

2) Now, enter your desired LAUNCH DATE (T) in the center box below.

3) Subtract 60 days from your launch date and enter it in the box on the left.

This when you should start planning. Make sure you have at least 2 months before your campaign is planning to launch.

4) Subtract 15-30 days from your launch date.

This is when you should begin pre-promoting your campaign ("Pre-Motion")

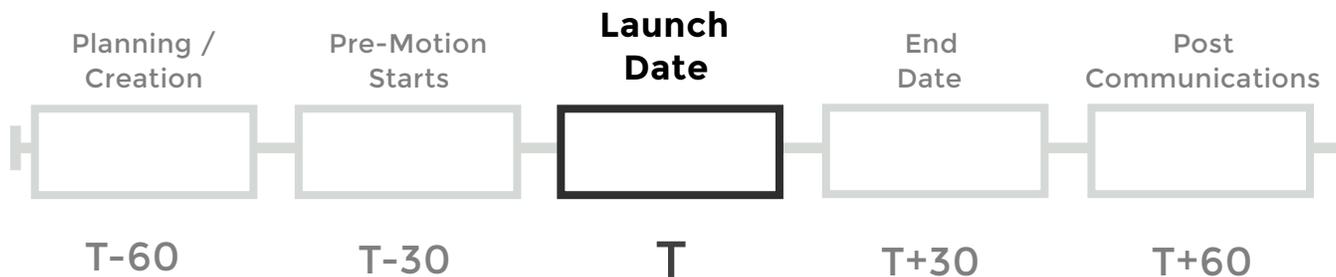
5) Add 30 days (or your campaign's duration) to the your launch date to determine your campaign's end date.

Make sure this fits with the other events you know about from step 1.

6) Add 60 days to your launch date and enter it in the box on the right.

This is when you should conclude your followups/thank-you's

7) Make sure you keep updating your supporters long after your campaign ends!



Part 6: The How Plan for Success

Now let's think about how you are going to get your message to the people who truly care about this campaign. What message are you going to deliver to each group and how will you reach them?

Step 1: Review “Part 2: The Who” and copy each group you identified into a row in column 1 of the table below. These are your audience segments.

Step 2: For each audience segment, think about why they care, what they can do and the impact they want to have. Enter this for each in column 2.

Step 3: What is the best way to reach each audience segment? Think about direct channels of communication that can reach this segment directly, and write these channels in column 3.

	Audience	Message	Channels
1	<i>Example: Current Robotics Club Members</i>	<i>Our club is at risk of shutting down! You can help by donating to the club, and getting 3 other friends or family members to donate! Let's bring the gift of robotics to a new generation and change the lives of people in our community!</i>	<i>– Conversation at club meeting – Club newsletter – Phone calls to key members – Personal email appeals to each member – Club Facebook page</i>
2			
3			
4			

	Audience	Message	Channels
5			
6			
7			
8			
9			
10			
11			
12			



This table will help you complete the [Campaign Marketing Accelerator](#) workbook.

Part 7: After Your Campaign is Over

Completing the Circle

Be prepared to communicate with your supporters so they can experience how their support created real world impact!

N) How do you want a supporter to **feel** after the campaign?

O) What do you want a supporter to **do** after the campaign?

Example: Keep following our robotics team, be willing to support other great causes.

P) Now, take some time to plan / draft your post-campaign communications to thank donors, emphasizing the outcome of their support and letting them know ways to stay engaged / what's next:

- I. **At campaign end:** "We did it! Campaign has ended and here are the results!"
- II. **15-30 days after campaign (demonstrating impact):** "We are putting your funds to good use. Look at the impact you have caused!"
- III. **30+ days after campaign:** "Thank you for supporting our campaign, you have made a huge difference in the world. We hope you will continue to support the other great campaigns on this platform!"

Part 8: Pre-Launch Checklist

Let's put the rubber to the road!

Congratulations! You now have focused your vision, identified your team, determined your audience, crafted your message/goals and discovered your communication channels!

Now it's time to turn your passion into action. **Let's do this!**

Week 1: Foundation

- Assemble Your Campaign Team**
- Complete the *Campaign Planning Accelerator***
- Research your topic**
 - Who cares about this topic?
 - Look at other crowdfunding campaigns online for inspiration
- Complete the *Campaign Marketing Accelerator Workbook***
 - Finalize your Marketing Strategy
- Start your campaign application**
 - Title, Summary, Story
 - Goals & Timeline

Week 2: Community

- Create / update social media accounts.** (Facebook, Twitter, LinkedIn etc.)
- Contact your Campaign Champions***
- Identify and follow relevant influencers on social media.**
- Create your MyCommunity Email Lists**
- Create an Email Outreach Schedule**
- Extra Credit: Write 10-15 different 3-sentence descriptions of your project.**
- Storyboard your video**
 - Review Video Creation Guide
- Create a Facebook Event scheduled for your launch day and send invites**

Week 3: Content

- Design your campaign's rewards structure (if applicable)**
- Finish campaign video**
 - Upload it to YouTube or Vimeo
- Finish your campaign application**
 - Add images to story section
 - Photos, infographics, headers etc.
 - Get all green "check marks"
- Draft pre-campaign emails**
- Draft thank you emails**

Week 4: Communications

- Write press releases for local media**
- Schedule your social media posts**
- Draft social media posts for your Campaign Champions to share**
 - 10 Tweets
 - 5 Facebook Posts
 - Short Template Emails
- Email your Campaign Champions* & Early Supporters***
 - Give them instructions (fund/share)
 - Provide draft emails, tweets, FB posts
 - Have them create their own email list to share the campaign with.
- Start executing marketing plan**
- Launch your campaign when ready!**

*Use the Marketing Accelerator Workbook to identify your Campaign Champions and Early Supporters