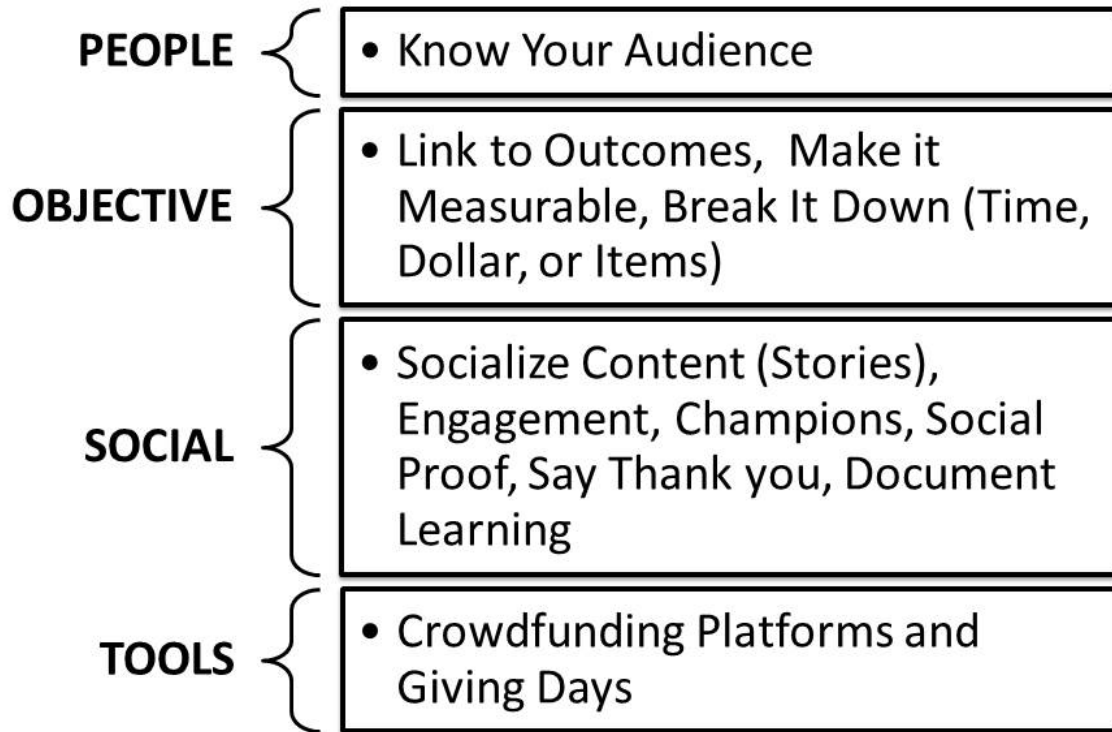




# Crowd Funding Strategy Worksheet

## POST for CROWDFUNDING STRATEGY



@kanter

## PEOPLE

Segment	Description
Target Audience 1:	
Target Audience 2:	
Target Audience 3:	



- What keeps them up at night? What are they currently seeking?
- Where do they go for information? What influences their decisions to donate?
- What’s important to them? What makes them act?
- What additional research do you need to do?

## OBJECTIVE

What do you want to accomplish with your crowdfunding campaign? Keep in mind that crowdfunding is particularly useful to raise money for a specific project, need, or campaign. The more specific, the better. Also, crowdfunding works when it is time-based and you can create a sense of urgency. It also works well with matching incentives, so your goal could be to help leverage a larger donation from an existing donor.

Objective	Metric
Objective 1:	
Objective 2:	
Objective 3:	

What metrics will you use measure success?

One exercise you might want to go through to define success is to gather a diverse group of staff and have them answer the following questions:

- How do you define success for our organization or program?
- How do you define failure for our organization or program?
- How do you define success for your crowd fundraising campaign?
- How do you define failure for your crowd fundraising campaign?
- What is the cost of the project or idea (don’t forget to include fundraising costs)?

Break these down into micro campaign goals in one of the following ways:

Item Specific: We need x items to see this specific outcome

Dollar Specific: We need to raise \$ to see this specific outcome

Time Specific: We need to raise \$ to get item by this deadline to see this specific outcome



## Micro Campaign Goal

Donation Level	Level Description	How many donations?	Total Amount
\$			
\$			
\$			
\$			
\$			
<b>TOTAL AMOUNT TO BE RAISED</b>			

# SOCIAL STRATEGY

### CONTENT/STORIES

What’s the story you’re telling about how you will use the money raised to reach your outcomes?

How do you talk about your organization’s work, place it in a broader context and inspire people to contribute?

What type of story?

- **The Issue Story:** This story talks about the field or fields within which you work and how your project solves a larger social issue
- **The Local Story:** This is about a specific local community and how your project serves them
- **The People You Serve Story:** This is the story of how the people you serve through your project will be transformed
- **The Behind the Scenes Story:** This is a peek inside how your organization is working on the project or why it is important
- **Innovation Story:** It describes what are you doing that’s new, unique or innovative?

Brainstorm Your Story

- Once upon a time...
- And everyday until...
- Until one day...



- Because of that...
- Until finally...
- And ever since that day...
- And the moral of the story is...

**ENGAGEMENT**

What are all the difference ways you can get people engaged through social channels with your campaign?

Brainstorm Ideas	Level of Engagement
	Ask network to make donation
	Donate
	Ask supporters to share content
	Engage audience in conversation about cause
	Share information about the campaign

**CHAMPIONS**

- Who can organize and support champions?
- Who are your internal champions?
- What stakeholders can you ask to be your champions online?
- What research do you need to do to find champions?
- What materials do you need to create for champions?

**SOCIAL PROOFING**

- How can you incorporate social proofing?

**THANK YOU**

- What are some creative ways you thank donors?

**DOCUMENTATION**

- What is your plan for documenting as you go?
- How can you capture examples of content generated by champions?
- What is your plan for an after campaign review with your team?



# TACTICS AND TOOLS

## Tools and Tactics

- Does it make sense to use a crowd funding platform or direct to your online donations?
- Is the timing right to participate in a local or national giving day?