

CAMPAIGN PLANNING STEP	KEY TASKS	NOTES
ANALYZE YOUR PAST CAMPAIGNS	<ul style="list-style-type: none"> • What worked well this year? • What didn't work well this year? • What should you do differently next year? 	
SET CONCRETE GOALS	<ul style="list-style-type: none"> • Define the type of campaign you'll hold. • Define your main goals for the campaign. • Choose and set KPIs to track progress. 	
OUTLINE YOUR CAMPAIGN	<ul style="list-style-type: none"> • Create a month-by-month breakdown of your strategy. • Set benchmarks for KPIs. 	
ASSEMBLE YOUR TEAM	<ul style="list-style-type: none"> • Decide which internal and external teams will need to be involved in your campaign. • Choose teams and assign tasks. • Consider working with a consultant and choose a partner. 	
PREP YOUR TECH	<ul style="list-style-type: none"> • Conduct a technology assessment. • Research platforms that may be useful to carry out your strategy. • Invest in new technologies or optimize your current solutions. 	
PLAN YOUR STRATEGY	<ul style="list-style-type: none"> • Define your fundraising and marketing strategies. • Set key dates and deadlines for each strategy. • Assign tasks for each strategy and begin planning the specifics. 	
CONDUCT YOUR CAMPAIGN	<ul style="list-style-type: none"> • Carry out your strategy from the last section. • Check in regularly at set benchmarks. • Adjust your strategy as needed. 	
FOLLOW-UP	<ul style="list-style-type: none"> • Share results of your fundraising campaign widely. • Email, call, or meet with individual donors to express gratitude. • Evaluate data from your year-end campaign. • Jot down enhancements or ideas for next year's campaign. 	