



September Checklist

- ☐ **Assess & Set Direction for EOY**
 - ☐ Review last year's EOY campaign performance
 - ☐ Identify giving trends in your donor base
 - ☐ Define clear, measurable goals
- ☐ **Audience Segmentation**
 - ☐ Identify and segment your target audience
 - ☐ Quick donor survey
- ☐ **Develop Core Messaging**
 - ☐ Create compelling messaging
 - ☐ Craft consistent call-to-action (CTAs)
- ☐ **Create a Seamless Donation Process**
 - ☐ Enhance the donation process and form
- ☐ **Optimize Your Online Presence**
 - ☐ Ensure the website is mobile-friendly
 - ☐ Add a dedicated EOY campaign landing page

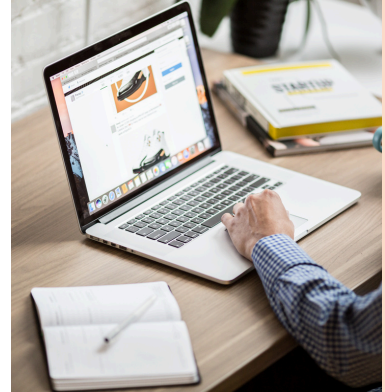
Detailed Outline of September Action Plan

ASSESS & SET DIRECTION FOR EOY

Setting clear, achievable goals gives your campaign direction and purpose.

Steps to Setting Goals:

- **Analyze Previous Campaigns:** Look at your previous end-of-year campaigns. How much did you raise? What was your ROI (Return on Investment)? Use this data to set SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals.
- **Consider Current Trends:** Are there new giving trends or economic factors that might impact donations?
- **Set a Fundraising Target:** Based on your analysis, set a target that is ambitious yet attainable.
- **Break Down the Goal:** Divide your overall target into smaller, manageable milestones to track progress.



IDENTIFY & SEGMENT YOUR TARGET AUDIENCE

Tailor your messaging to better resonate with donor segments and raise more.

Steps to Identify and Segment Your Audience:

- **Use Donor Data:** Segment your donors by location, age, donation amount, and frequency (e.g., major donors, recurring, lapsed, first-time).
- **Create Donor Personas:** Develop detailed profiles of your typical donors. Include their motivations, giving habits, and preferred communication channels.
- **Survey and Feedback:** Directly ask your donors about their preferences through surveys or feedback forms.

DEVELOP CORE MESSAGING & CTAS

Craft a compelling and emotive case for support. And once you've connected with your audience, it's time to motivate them to act with a clear and concise call-to-action (CTA).

Key Elements of a Strong Case for Support:

- **Tell a Story:** Share real-life examples and personal anecdotes of the impact your charity has made.
- **Highlight Urgency:** Explain why your cause needs immediate attention.
- **Show Impact:** Use statistics to demonstrate the tangible outcomes of donations. For instance, *"Every \$50 donation helps provide meals for 10 children."*



Steps to Crafting an Effective CTA:

- **Be Direct:** Tell your audience exactly what you want them to do.
- **Create Urgency:** Encourage immediate action with phrases like *"Donate Now"* or *"Fund Real Change this GivingTuesday"*.
- **Highlight Benefits:** Mention how their contribution will make an impact.



CREATE A SEAMLESS DONATION PROCESS

Optimize your donation process so you are best able to leverage donors who land on your form.

Tips for Optimizing the Donation Process:

- **Simplify Forms:** Keep donation forms short and only ask for necessary information.
- **Multiple Payment Options:** Offer various payment methods, such as credit cards, PayPal, and direct bank transfers.
- **Recurring Donations:** Provide an option for donors to set up recurring donations easily.
- **Security Assurance:** Clearly display security badges and reassure donors that their information is secure.

OPTIMIZE YOUR ONLINE PRESENCE

Ensuring your website is mobile-friendly, creating a dedicated landing page for your end-of-year campaign, and optimizing your donation process. All of this is crucial for retaining and engaging visitors and boosting giving.

Steps to Optimize for Mobile:

- **Responsive Design:** Implement a responsive design that adapts to different screen sizes and devices.
- **Simplified Navigation:** Create straightforward and clear navigation menus. Avoid clutter and ensure important links are easily accessible.
- **Fast Load Times:** Optimize images and reduce unnecessary scripts to improve load times. For example, CanadaHelps' mobile-friendly design ensures that donors can easily navigate the site, find information, and make donations with minimal effort.



Key Elements of an Effective Campaign Landing Page:

- **Compelling Headline:** Use a strong headline that captures attention and conveys urgency.
- **Clear Call-to-Action Buttons:** Place prominent CTA buttons encouraging immediate donations.
- **Impact Stories and Visuals:** Include compelling stories, images, and videos that demonstrate the impact of donations.
- **Transparency:** Outline how funds will be used, offering transparency to build trust.