



# October Checklist

## ☐ **Create Your Content Toolkit**

- ☐ Email templates
  - ☐ Pre-launch awareness
  - ☐ GivingTuesday push
  - ☐ Mid-campaign updates
  - ☐ Final week & last-day appeals
  - ☐ Impact Updates
- ☐ Image assets

## ☐ **Build Out Donor Stewardship Communications**

- ☐ Automatic thank-you emails
- ☐ Personalized follow-up email templates
- ☐ Public recognition plan

## ☐ **Social Media Plan**

- ☐ Social media calendar
- ☐ Social media post materials
- ☐ Social media assets

## ☐ **Early Outreach**

- ☐ Outreach to major donors & loyal supporters

## ☐ **Showcase Impact & Build Trust**

- ☐ Impact report
- ☐ Impact stories
- ☐ Infographics
- ☐ Behind-the-scenes content
- ☐ Videos

## ☐ **Test & Finalize Giving Options**

- ☐ Test donation process on mobile, desktop & tablets
- ☐ Clear information about giving options
- ☐ Highlight benefits of giving options
- ☐ Personal assistance options

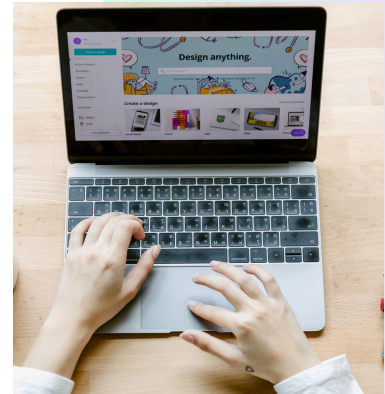
# Detailed Outline of October Action Plan

## CREATE YOUR CONTENT TOOLKIT

Have content templates and communications plans ready to deploy across channels and audiences as the peak giving periods draw closer.

### Key Types of Content Templates to Build Out:

- **Email Templates:** Draft for pre-launch awareness, GivingTuesday push, mid campaign updates, final week and last-day appeals.
- **Impact Updates:** Templates to help showcase impact through the season, depending on the channel you plan on sharing them, including email, website, and social media.
- **Image Assets:** Any image design templates, with GivingTuesday branding or giving season branding, or even campaign-focused branding.



## BUILD DONOR STEWARDSHIP COMMUNICATIONS

Timely acknowledgments strengthen relationships and encourage future support.

### Steps to Effective Acknowledgment:

- **Immediate Confirmation:** Set up an automatic thank-you email that reaches donors immediately after they donate.
- **Personalized Notes:** Draft personalized follow-up email templates for different donor segments.
- **Public Recognition:** Plan at least one public recognition post for donors during campaign — with the donor's consent — via your website, social media, or newsletters.

## PLAN SOCIAL MEDIA CALENDAR

Develop and organize posts to raise awareness and engagement, and leverage for end-of-year marketing blitzes.

### Key Steps to Take:

- **Social Media Calendar:** Create a calendar that covers posts for campaign dates, leading all the way up to GivingTuesday, and the final push.
- **Social Media Post Types:** Identify impact stories, testimonials, and staff stories to highlight, as well as those to encourage giving.
- **Social Media Assets:** Gather photos, videos, or short interviews to humanize your appeals.
- **Responsibility:** Identify who on the team would be responsible for social media handling, and that they have a clear direction.



## EARLY OUTREACH TO KEY DONORS

Begin reaching out to major donors and loyal supporters to build early momentum.

## SHOWCASE IMPACT & BUILD TRUST

Build momentum with impact stories and end the giving season strong.

### Types of Compelling Content:

- **Impact Report:** Any overarching impact report from last year's donations.
- **Impact Stories:** Narratives of individuals or communities positively affected by donations.
- **Infographics:** Visuals that highlight statistics and achievements.
- **Behind-the-Scenes Content:** Short posts, images or videos that showcase your team's work.
- **Videos:** Short videos that capture the essence of your mission and the difference made by donors.

## TEST & FINALIZE GIVING OPTIONS

Test the donation process on mobile, desktop, and tablets, and provide clear information to donors.

### How to Promote Giving Options:

- **Clear Information:** Make details about each giving option easily accessible on your website and in communication materials.
- **Highlight Benefits:** Explain the advantages of each method for both the donor and the organization.
- **Personal Assistance:** Offer direct support for setting up more complex giving options, like stock transfers or planned gifts.

