

CAMPAIGN PLANNING STEP	KEY TASKS	NOTES
ANALYZE YOUR PAST CAMPAIGNS	• What worked well this year? • What didn't work well this year? • What should you do differently next year?	
SET CONCRETE GOALS	• 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	• Create a month-by-month breakdown of your strategy. • Set benchmarks for KPIs.	
ASSEMBLE YOUR TEAM	• 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	• 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	• 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	• Carry out your strategy from the last section. • Check in regularly at set benchmarks. • Adjust your strategy as needed.	
FOLLOW-UP	• 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.	