



WORKBOOK

Microcampaign Planning

How Williams College creates targeted campaigns
that inspire donations

Williams
College



“We need more engagement!”

“We need more young alumni donors!”

“We need funding for this priority project!”

Sound familiar? Advancement shops across the country run up against the need to fund priority projects or engage target populations, and standard solicitation campaigns aren't always the standard for success.

Enter: micro-campaigns.

Williams College's strategy surrounding micro-campaigns is intentional, and it works.

The following workbook, developed by [Kelan O'Brien](#) at Williams College, will guide you through the process of creating a campaign that converts.

Pre-Planning

Name:	
Dates:	
Goals:	Are you measuring donors, dollars, and/or gifts? Are there engagement/non-giving goals?
Match/Challenge:	Follow your own team and institution's protocols, but make sure it's clear internally if the donor(s) wish(es) to remain anonymous, and/or how they'd like to be referred.

Staff Leads

General:	
Engagement:	
Giving Platform:	
Assets:	
Solicitations:	
Stewardship:	

Giving Platform

Platform:	Build/clone Social Fundraising Platform page or giving form	<i>(goal finish date)</i>	<input type="checkbox"/>
Copy:	Completed copy to use on the page or form		<input type="checkbox"/>
E-Receipt(s):	Are you adding special language to the receipts or using a general one from the institution?		<input type="checkbox"/>
Giving Form:	One-Time and/or Recurring Donation Suggested Amounts, Designation Settings, Form Design and Copy (Pre, Actual, and Post)		<input type="checkbox"/>
Recurring Options:	Monthly? Annually? Set amount of time or indefinitely?		<input type="checkbox"/>
AO Check In:	Does anyone need to run a test gift on your page?		<input type="checkbox"/>
Offline Matches/Challenges:	When are they being uploaded? How are they being listed/named?		<input type="checkbox"/>
Pre-Planned Updates:	Are there milestones that you will want to provide an update for that you can write ahead of time? Will the updates be sent to donors, or just posted on the page?		<input type="checkbox"/>

Template created by [Kelan O'Brien](#) at Williams College

Assets

Logo:	(add file link)	<i>(goal finish date)</i>	<input type="checkbox"/>
Video:	(add file link)		<input type="checkbox"/>
Background Image:	(add file link)		<input type="checkbox"/>
Video Thumbnail:	630x350 (add file link)		<input type="checkbox"/>
Share Image:	600x315 (add file link)		<input type="checkbox"/>
Campaign Card:	600x400 (add file link)		<input type="checkbox"/>

Solicitation Communications

Primary Audience: All non-donors? All alumni/constituents? Black Student Union alumni?

	Send Date/Time	Signer(s)	Draft	Sent
Launch:			<input type="checkbox"/>	<input type="checkbox"/>
Kicker:			<input type="checkbox"/>	<input type="checkbox"/>
Special:				<input type="checkbox"/>
Social Media:	What platforms? Who is creating the content? Does content need to be sourced?			<input type="checkbox"/>

Stewardship

Giving Platform Updates:	Updates that will also be sent to donors when they are posted	<i>(goal finish date)</i>	<input type="checkbox"/>
Microcampaign Specific Stewardship:	Email? ThankView?		<input type="checkbox"/>
Related Event:			<input type="checkbox"/>

Engagement

Event

Name:	
Date:	
Location:	In-person or virtual

Goals:	Alumni to student engagement? Intellectual engagement? Town hall style?		
Audience:	All alumni? All Black alumni? Graduates of the last decade?		
Event Summary:			
Invitation:	How is it being sent? Does anyone need to approve it? Are you requiring registration?	(goal finish date)	<input type="checkbox"/>
Attendees Logged:	Has your attendee list been logged in your CRM?		<input type="checkbox"/>
Post-Event Thoughts:	Do you think it was a success? By what measures? What would you do differently? Is there any follow up needed?		

Copy

About

draft

Special Content

Title:

draft

Updates

Update #1

Title:

When: Pre-planned? For a milestone?

Send to Donors: Y/N

draft

Update #2

Title:

When: Pre-planned? For a milestone?

Send to Donors: Y/N

draft

Solicitations

Launch Solicitation

Platform: Email/ThankView/etc.

Audience:

Date/Time:

Sender:

Preheader Text:

Subject:

draft

Kicker Solicitation

Platform: Email/ThankView/etc.

Audience:

Date/Time:

Sender:

Preheader Text:

Subject:

draft

Special Solicitation

Platform: Email/ThankView/etc.

Audience:

Date/Time:

Sender:

Preheader Text:

Subject:

draft

