ProjectWHOI project manager CHECKLIST: building your campaign

APPLY:

- Know your crowdfunding goal and describe your project clearly.
- ✓ Choose your campaign length (30 or 60 days).
- ✓ Fill out the online application and submit.

PROJECT DESCRIPTION: Tell Your Story

Before the campaign:

- ✓ Make your title clear and short (10 word max).
- ✓ Get readers' attention: put the most important information first.
- ✓ Tell a compelling story, but also keep it short.
- ✓ Clearly explain why you are asking for money.
- Share details about yourself, your team and important events that shaped your project.
- ✓ Explain your budget to build donor trust.
- Use headings to break longer text into chunks.
- ✓ Include a brief bio about yourself.
- ✓ End with a clear call to action. (e.x.: Please donate!)
- ✓ Proofread! Watch out for typos and grammar errors.
- ✓ Find an editor: Ask a trusted friend or colleague to review your page and give you feedback.

During the campaign:

 Post at least 3 updates and thank donors on your page throughout your campaign.

PHOTO & VIDEO: Introduce Yourself to Your Donors

- ✓ Include a photo of yourself.
- ✓ Make a short video (1-3 minutes) that describes your project and why you need funding.
- ✓ Star in the video to help donors connect to you.
- ✓ Use music to set a positive tone.
- Let your donors know they are an important part of making your work possible.
- ✓ End with a clear call to action.

SPREAD THE WORD: Email and Social Media

Before the campaign:

- Ask close friends and family to commit to donating when your campaign starts.
- Recruit friends, family, and colleagues to fundraise on your behalf by starting their own page (optional).

During the campaign:

- ✓ Use the email template in your Participant Center to ask your contacts to donate. Reach out at least 3 times during your campaign.
- ✓ Ask family and friends to reach out to their networks and let them know about your project.
- Brainstorm other people or groups who may be interested in your work.
- ✓ Facebook: Engage friends by asking questions and requesting feedback. Link to your video and your page and at various points during the campaign.
- ✓ Twitter: Post facts and interesting tidbits from your project and link to your page. Use trending hashtags to widen your reach.
- ✓ **Instagram:** Take photos of your project and keep followers updated. Include a link to your project.
- ✓ Ask your followers to share/like/retweet your posts.
- ✓ Draft a press release for local media outlets.
- ✓ Follow up! Gently remind contacts and media about your campaign and update them on your progress.

After the campaign:

- Say thank you! Email all donors to tell them how you did. Remind them how you will use the money and thank them for their support.
- ✓ Stay in touch: Link donors to your lab page or other site so they can follow your work. Showing donors the impact of their gift may inspire them to donate again someday!