

# Fundraising Appeal Planning — Check List —



## Avoiding the Bad and Ugly in End-of-Year Fundraising Planning + Content + Segmentation = Success

We want to help you make the journey to end-of-year fundraising an easy one. Start below and check off as you go.

### Checklist for Planning

- ☐ Plan early and anticipate bottlenecks
- ☐ Identify key milestones and tasks (consider putting some in Outlook® and on everyone's calendar)
- ☐ Create a calendar and share with stakeholders
- ☐ Be inclusive early on, so no one feels out of the loop
- ☐ Assign tasks, set expectations, and pick a project lead
- ☐ Work with the resources you have—don't overdo it
- ☐ Don't go dark on January 1—kick off your stewardship effort



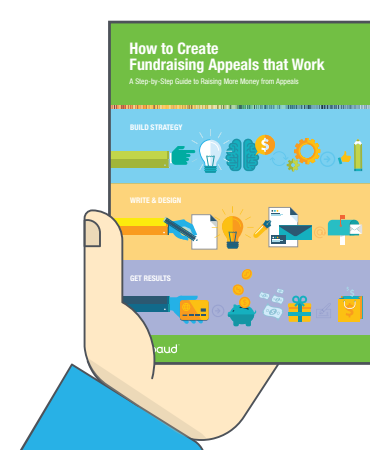
### Checklist for Content

- ☐ It starts with a theme (that's the glue that holds all content together)
- ☐ The right photos and images set the tone, so choose the right ones
- ☐ Focus on subject lines
- ☐ Learn how to write stories (it's a narrative, not a report)
- ☐ Plan for major channels like direct mail, email, website, social, and also consider smaller or lesser used channels that may come into play
- ☐ Don't have more than one CTA (you're asking for a gift, nothing else)



### Checklist for Segmentation

- ☐ Identify who you are asking
- ☐ Pick the right channel for your audience (do they prefer email? Do they respond to both direct mail and email?)
- ☐ Segment your messages—never send to everyone
- ☐ Update and suppress donors along the way (don't ask if they already gave!)



With these to-dos checked off your list, get ready for all the good that comes with end-of-year fundraising.

Get the extensive guide to creating fundraising appeals here:

Download it now

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