

Campaign Strategy Template

Crowdfunding Planning Template		Open tasks	
Status	Task	Assigned to	Assigned to
Task Status	Test your pitch		
Task Status	Create a budget		
Task Status	Collect campaign assets (images, videos)		
Task Status	Determine perks		
Task Status	Test your perks with the target audience		
Task Status	Produce your pitch video		
Task Status	Test the video with your target audience		
Task Status	Prepare a publishing plan for the campaign		
Task Status	Get your team to evaluate their availability		
Task Status	Prepare press releases / on 50% Website		
Task Status	Contact your network to secure a 20-30% seed investment		
Task Status	Start sell launch (if applicable)		
Campaign Launch			
Task Status	Press release about the launch		
Task Status	Keep growing your network		
Task Status	Launch your email campaign		
Task Status	Weekly email campaign		
Task Status	Analyze and tweak perks		
Task Status	Thank your supporters		

Creative individuals often underestimate the actions and resources required to attract the amount of capital they need in order to *take their idea from conception to reality*. The purpose of a campaign strategy is to *analyze* a creative project in terms of *available resources* and *proactively plan all tasks* necessary for a successful launch and smooth operation. In addition, it offers a *breakdown of funds raised* (after costs) from all perks

(pledge benefits) and some *key marketing verbiage* related to each one. This is where marketing and finance connect. A campaign strategy **clarifies** and **captures** what is truly necessary to **finance your project**.

INSTRUCTIONS

Download and open the Excel workbook entitled “Campaign Strategy Template.” Complete the elements of the workbook listed below.

Team Members

Enter names, roles, time available, reach (people) of all team members and email. You may customize / change the team member roles if it makes sense to do so by clicking on the “Template Options” tab of the workbook.

Checklist

Review all Tasks and assign them to a Team Member (or two members if desired).

Some tasks will not apply to your idea or your team’s area of expertise. If you plan on skipping a task, first ask yourself if it is necessary to your campaign or if it has a high probability of helping you achieve success. If so, add a team member and call it “outsource” (for example, for “Prepare press releases.” Enter Deadlines for all Tasks you have chosen.

Perks Planning

Enter all Perks (pledge benefits) on this spreadsheet, including the PRICE of each perk level, what this giveaway will actually COST you to produce & ship, and the total number of donors you anticipate receiving (Sales Goal) from each donor level.

Write and enter a *Short Description* of each Perk. Keep it brief but ingenious. Remember, you are selling and this is final marketing copy for public consumption.

Deliverables

The workbook should be submitted along with your Crowdfunding Profile. Please save the final spreadsheet with last names of all team members included in the filename and submit on the LMS.