



# Steps to Success Guide



# text2fund

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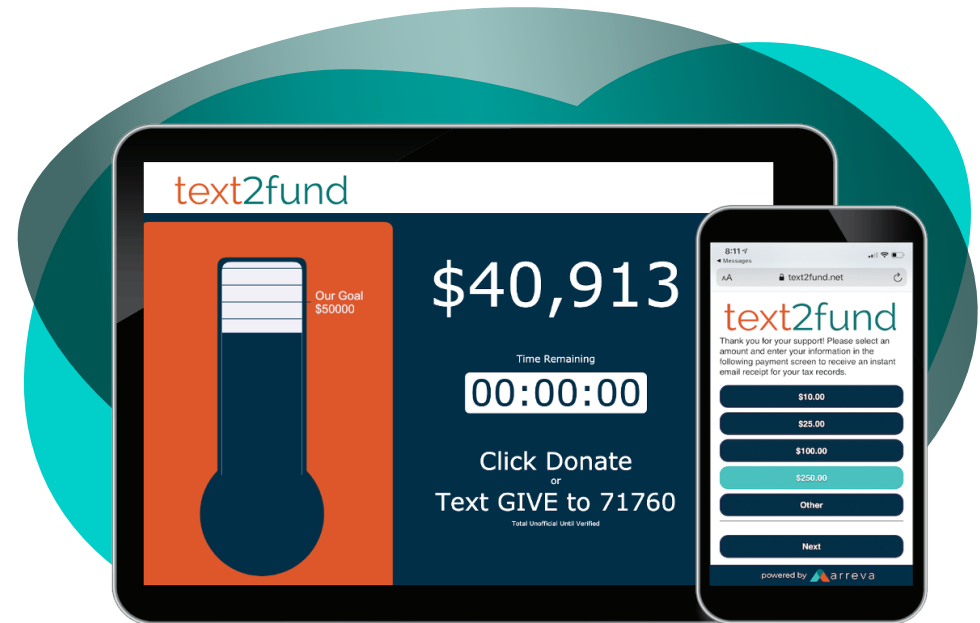
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# Set Fundraising Goals

Confirm how much money your organization will set out to raise, how many donors you want to reach, and the goals you are trying to achieve — aim high and be realistic.

Clearly define what your organization will accomplish with the funds raised — donors will be more apt to support your cause when they know the impact they are making with their contribution.



# Develop Call to Action Messaging

Make your message and calls to action heartfelt, and make sure they express the impact that donors can make with even the smallest gift.

Create compelling messaging about why you need the funds now.

- State the need and the challenge
- Be transparent in your ask
- Share stories of people that are/will be impacted by the donations
- Share testimonials of givers with reasons for their financial generosity

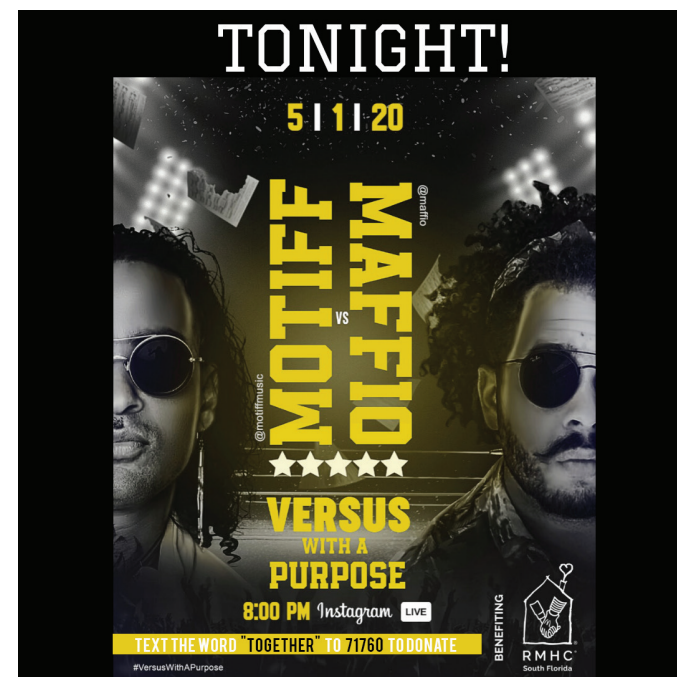
Testimonials of those that have previously benefited from funds raised will go a long way in promoting your short code and keyword.



# Create the Campaign Look and Feel

Create eye-catching visuals that are easy to read to use in all your Text2Fund Campaign promotions. Use different but consistent sizes/variations of graphics for all campaign communications and documents.

Promote Text2Fund and ways to give every time you communicate on behalf of your nonprofit. To do this successfully, create a few templates that demonstrate visually how to use Text2Fund.



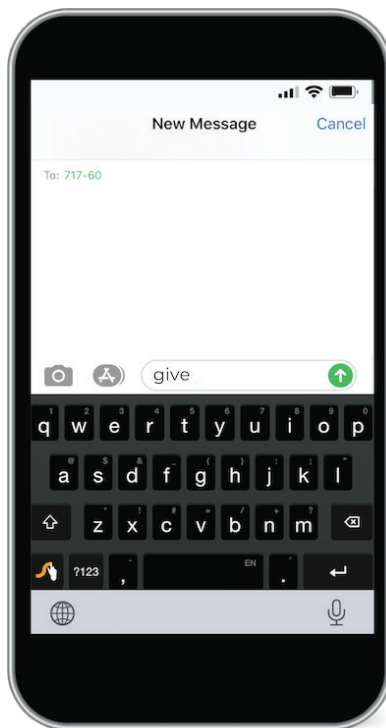
# Inform and Educate Team

Gathering your team is the most critical first step in this process. For any campaign to be successful, it is essential to educate your staff, board, and key volunteers about the benefits of Text2Fund and how to use the service.

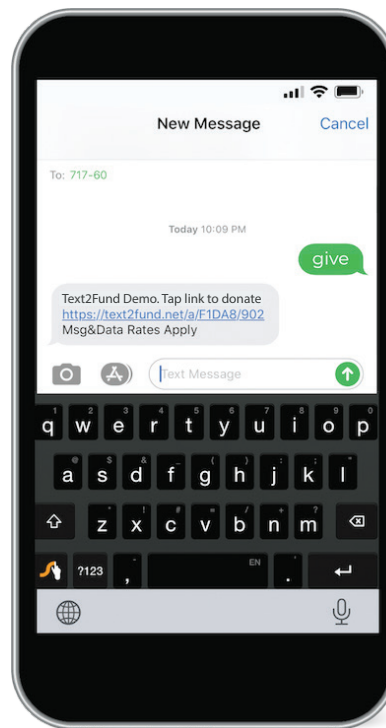
Take the time to educate your team about all the great benefits of Text2Fund and demonstrate how easy it is to use. Make it fun for them by encouraging them to give a test gift. Simply, share instructions on how to donate. You can even make a game out of it and promote some healthy competition between your leadership team.

## Follow Three Simple Steps in the Campaign Example Below

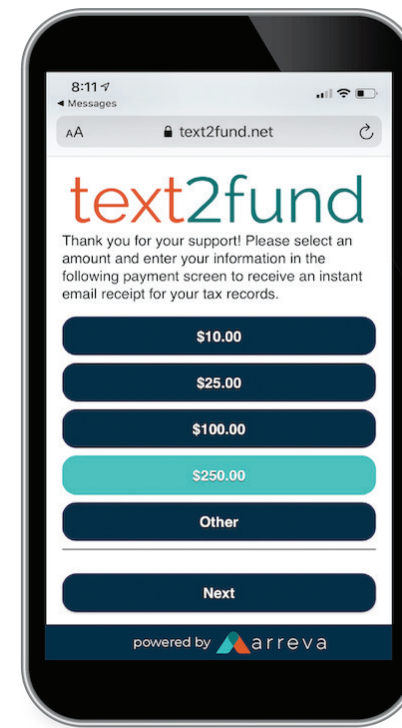
Text KEYWORD to 71760



Click the Link

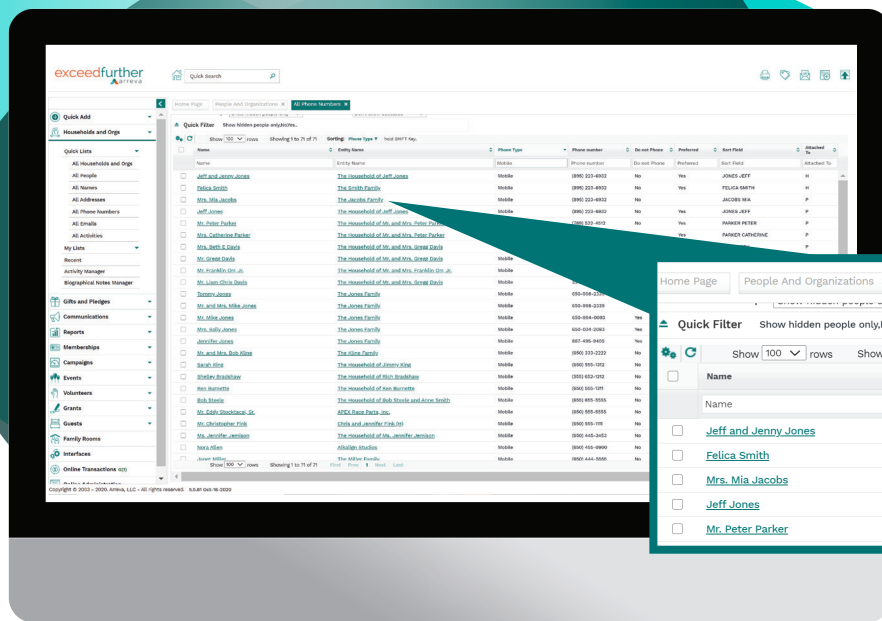


Donate



# Leverage Contacts in Database

Identify prospects and validate the contacts you have in your database. For those supporters with phone numbers, check which ones are mobile numbers so you can expand your reach with text messaging. You will also want to check which supporters you can reach by email and direct mail.



Home Page | People And Organizations | All Phone Numbers

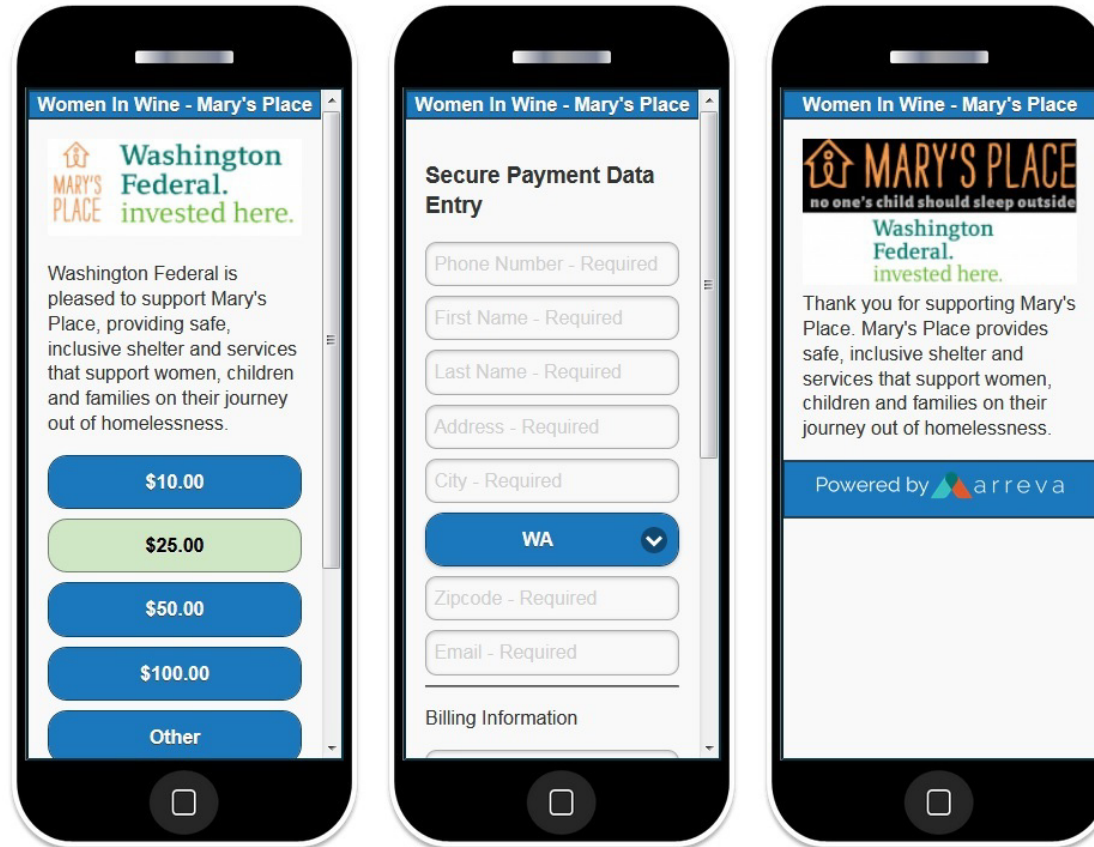
Quick Filter Show hidden people only.No,Yes...

Show 100 rows Showing 1 to 71 of 71 Sorting: Phone Type hold SHIFT Key.

Name	Entity Name	Phone Type	Phone number	Do not Phone	Preferred
<input type="checkbox"/> <a href="#">Jeff and Jenny Jones</a>	<a href="#">The Household of Jeff Jones</a>	Mobile	(895) 223-6932	No	Yes
<input type="checkbox"/> <a href="#">Felicia Smith</a>	<a href="#">The Smith Family</a>	Mobile	(895) 223-6932	No	Yes
<input type="checkbox"/> <a href="#">Mrs. Mia Jacobs</a>	<a href="#">The Jacobs Family</a>	Mobile	(895) 223-6932	No	Yes
<input type="checkbox"/> <a href="#">Jeff Jones</a>	<a href="#">The Household of Jeff Jones</a>	Mobile	(895) 223-6932	No	Yes
<input type="checkbox"/> <a href="#">Mr. Peter Parker</a>	<a href="#">The Household of Mr. and Mrs. Peter Parker</a>	Mobile	(789) 522-4512	No	Yes

# Solicit Sponsors from Business and Community Partners

Sell sponsorships to expand your campaign reach and to offset some of your campaign expenses. It is helpful to offer a variety of sponsor levels. You can even display a sponsor logo from the mobile view of the Text2Fund donation page.





# Recruit Campaign Ambassadors

Take the time to identify and recruit different types of influencers that will be happy to promote your Text2Fund campaign to their personal and professional networks to drive awareness and increase donations. Your target list should include influential bloggers, donors, community and business partners, and even local politicians and celebrities.

# Create Documents/Messages to Promote Text2Fund

Create internal and external resources to educate constituents on how to use Text2Fund. These items will be used during the campaign to promote your organization and provide information about the ways to donate to your cause.

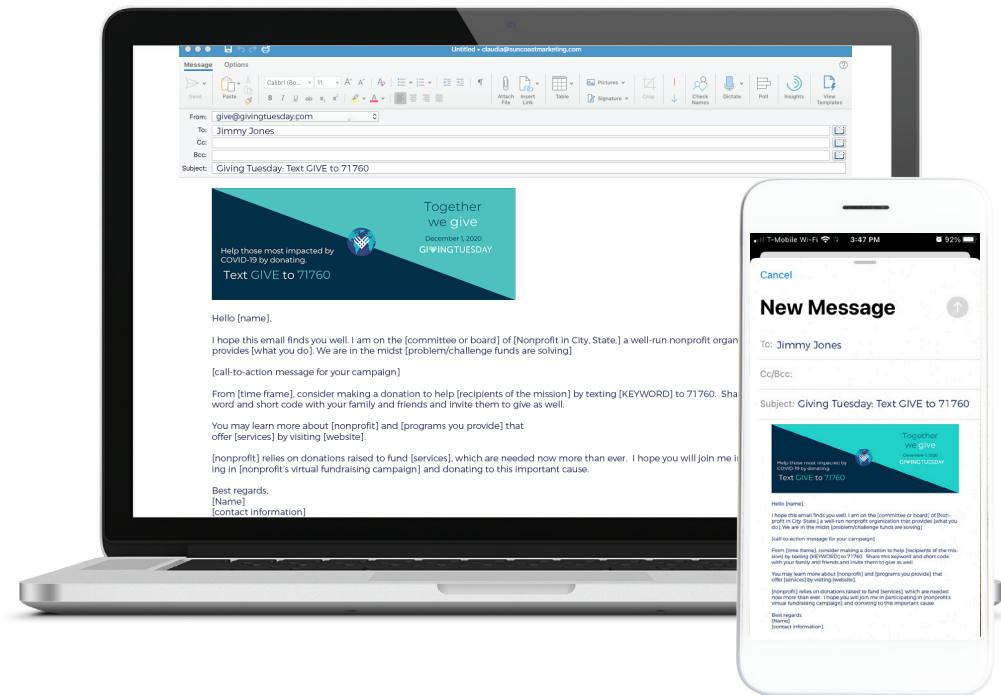


# Share via Email

Email marketing is one of the easiest and best ways to promote your Text2Fund campaign. Most organizations depend on email communications to connect with supporters and raise funds for their cause.

Send emails to your supporters. Include giving instructions in all relevant email communications. Make sure you include the Text2Fund keyword and short code with your call-to-action message. Always share how the funds raised will be used.

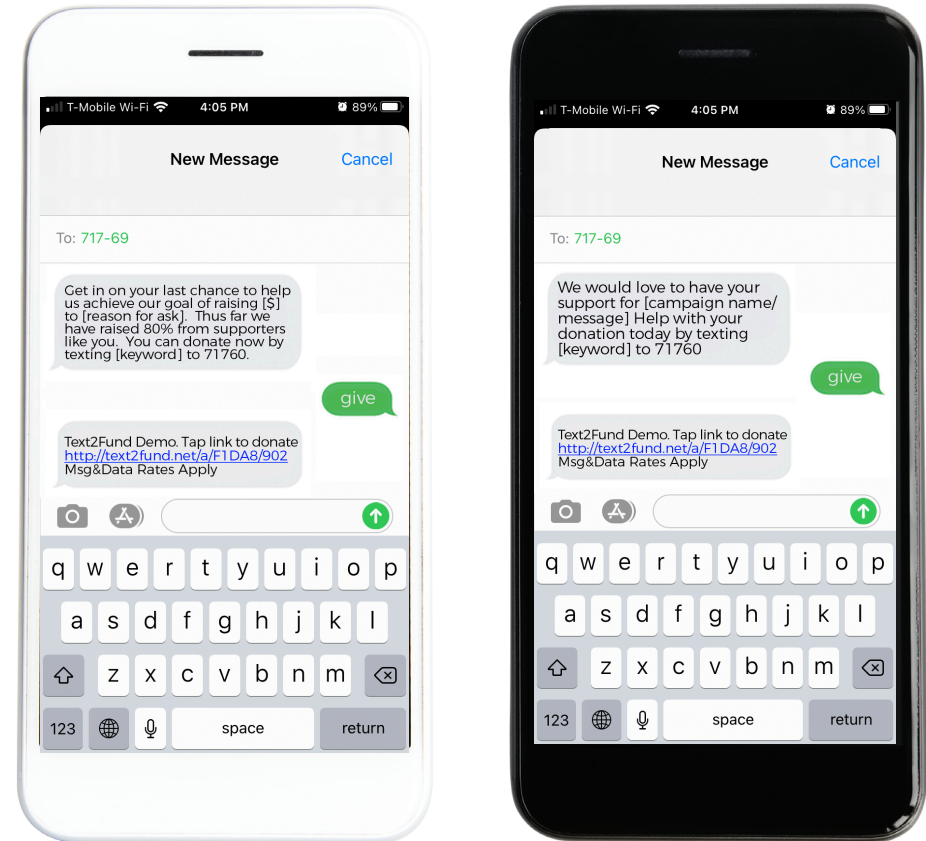
Creating mass mailers is a great way to communicate across a large audience and increase your campaign reach. Ask employees and volunteers to add the campaign message, keyword and short code to their email signature line.



# Engage Supporters by Text

Communicate by text to share updates about current campaigns and to provide updates about your fundraising goals met.

Keep the momentum going with updates via text message to keep your donors connected to your organization and informed about the programs supported by their fundraising dollars. Ask them for their support and encourage them to donate by text.

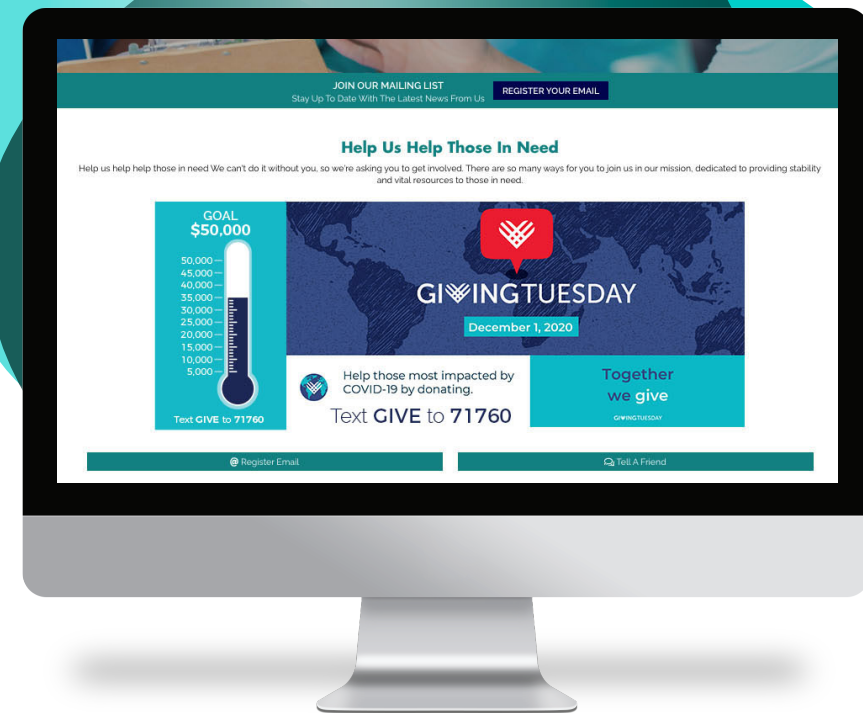


# Showcase on Website

Be sure that your Text2Fund Campaign, including your keyword and the 71760 short code, is prominently displayed on the homepage of your organization website.

Be sure to embed the Text2Fund campaign status widget on your website. This includes a thermometer to show the progress towards the campaign goals.

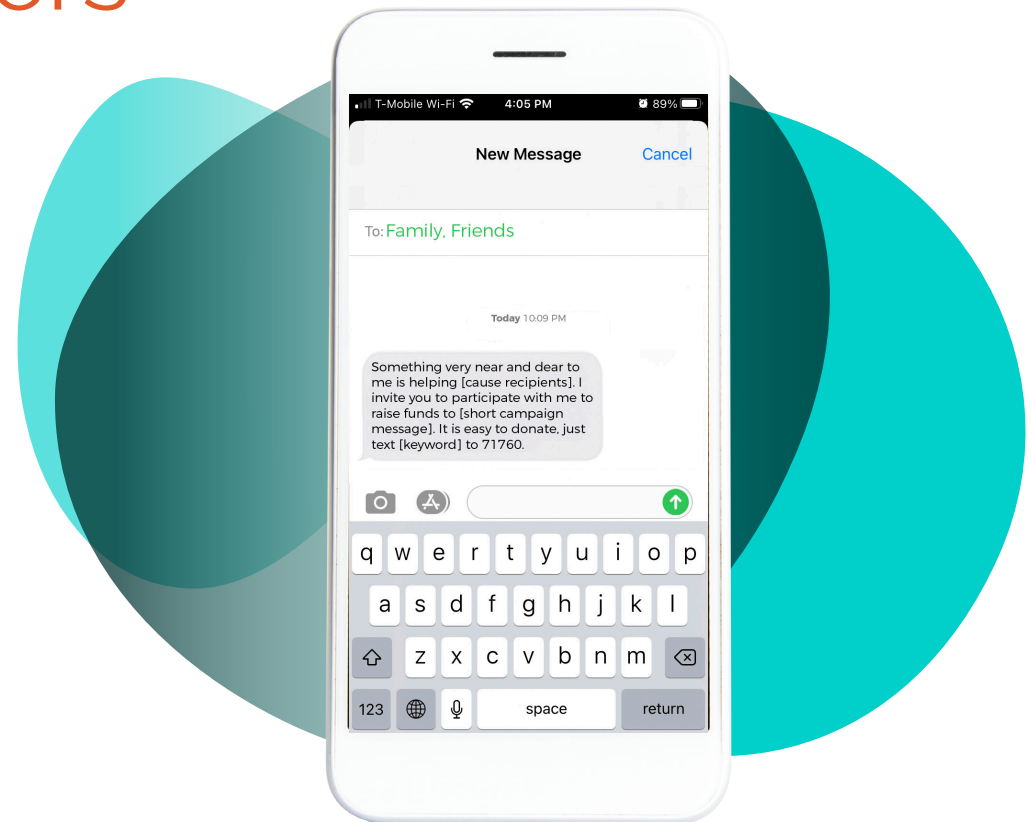
It is a best practice to create an engaging campaign landing webpage that includes your campaign call-to-action messaging, graphics and the instructions to text your keyword to 71760. All your campaign graphics, banners and ads should link to your campaign landing page.



# Leverage Peer-to-Peer Fundraising with Board and Volunteers

Ask your board members and volunteers to text their friends and family your Text2Fund Campaign short code and keyword. Provide a text message template they can easily forward to their contacts.

A happy donor is likely to share the good news with others. So make sure they know how to communicate on your behalf. You can help spread campaign awareness through word of mouth by making your Text2Fund campaign mission emotionally appealing and keeping donors engaged with real-time updates during the duration of your campaign.



# Promote on Social Media Accounts

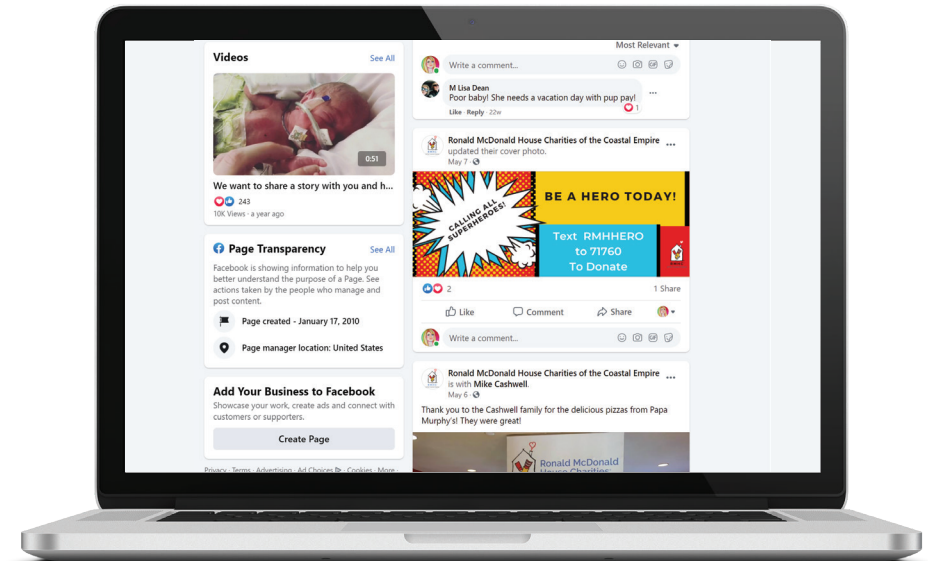
Your donors are on social media. Nowadays, everyone has at least one social profile. It is imperative to market the Text2Fund campaign details on your social media accounts.

Your organization can leverage the endless reach these social networks provide. No longer are you bound by a geographic location, and you ultimately can gain supporters and donors worldwide. You can increase donor engagement on social media by scheduling posts and running ads to reach potential subscribers with your campaign short code and keyword.

Make sure to update your social media platforms with new information often. You can share updates about the funds raised, your goals, and ways people can donate by text.

Combine a compelling story with your fundraising ask in your messaging. Be sure to tell your story in a heartfelt way, including testimonials, videos, interesting facts, and images that support why you need the funds and how you intend to use them.

Note, one of the benefits of Text2Fund is that you capture their phone number and email address in the process once someone donates. You can add to your email marketing software for future campaigns!



# Make Videos

Make a short video about the benefits of Text2Fund and use this during announcements online and in meetings. Post all videos on YouTube.

You can also include your Text2Fund messaging alongside other videos. From testimonials, campaign promotions, and more, video is a great medium to reach your donors about the benefits of donating to your cause.

All audiences quickly consume videos. Include the short code and keyword in the audio messaging or in captions. You can even include this in a scrolling banner alongside your other messaging.



# Utilize Digital Advertising, Newsletters, and Forums

Run ads or create posts in newsletters and social forums directed at your target audience.

There are countless ways to advertise your campaign. Find your audience in social forums and industry newsletters. Purchase an ad or start a discussion on your mission and provide the short code and keyword for your Text2Fund campaign.

Buying an ad on a social media platform is a creative way to pump excitement and views to your Text2Fund campaign. Search engine ads, native advertising, and display advertising are other forms that may work to bring awareness to your campaign.

Printed and digital newsletters are a great way to communicate your Text2Fund campaign details and status.





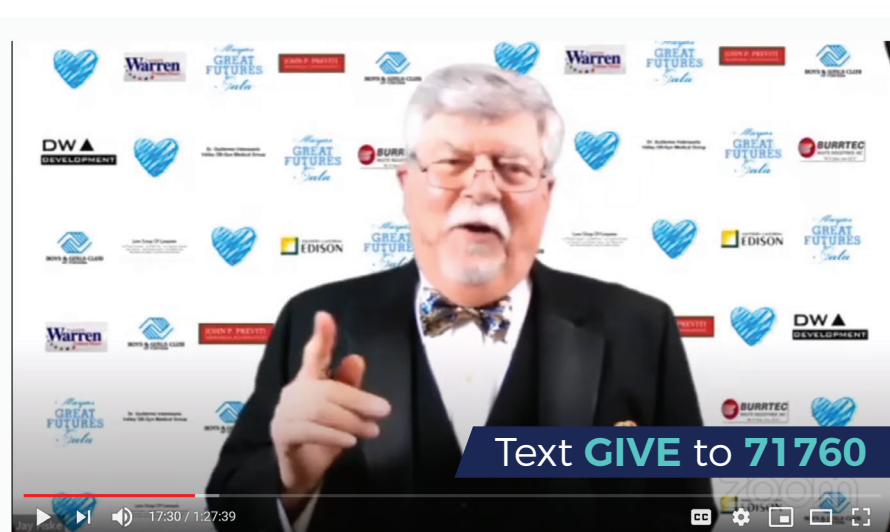
# Mention During Speeches and Interviews

Speaking engagement events are an excellent time to promote your Text2Fund campaign. One of the numerous features in Text2Fund is the ability to capture donations at any time since people always have their cell phone handy.

Speaking engagements and interviews are a prime example of utilizing the mobile donation aspect of Text2Fund to capture donations at the end of your emotional appeal.

Just like speaking engagements, use media opportunities and interviews to promote your Text2Fund campaign as an easy way people watching/reading can support your mission. Instead of directing your audience to your website when they get home, ask them to take out their cell phone right now and text your keyword to 71760!

If you don't have any speaking engagements planned, contact your local Rotary and Kiwanis Clubs to see if you can attend a meeting and talk about your cause.



# Promote via Direct Mail Marketing

Improve your direct mail response rates when you include messaging about Text2Fund. Over 30% of donors prefer to give after receiving direct mail. Make sure to include directions about how to use Text2Fund in your mail. Also, the Text2Fund **keyword** and **short code** should stand out.

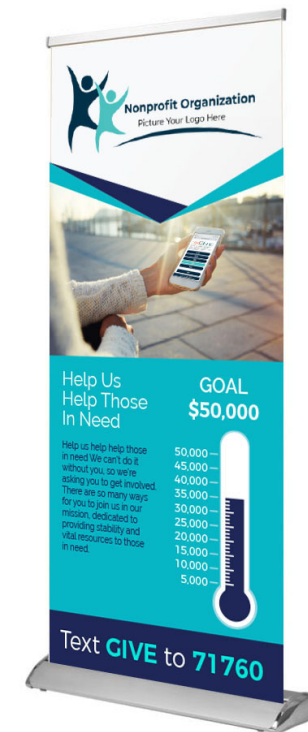
Include a reminder for Text2Fund in all your print communications. Permanently have a reminder about how easy it is to donate with Text2Fund. Whether it is an online newsletter, a print bulletin, a membership statement, or general update, don't miss out on this opportunity to promote Text2Fund.

# Develop PowerPoint Slides

If you run slides before and after meetings or nonprofit events, include your short code and keyword reminder there too.

# Display Signage

Use visual posters/signs or displays at locations or in-room events to promote your Text2Fund Campaign.



# Think Outside the Box!

Below are a few "creative" ways to promote your Text2Fund campaign:

- T-Shirts
- Car Wraps
- Yard Signs
- Start a blog and highlight all your campaign interactions
- Make a campaign challenge (think ALS ice bucket challenge)



# Next Steps

Begin with the Text2Fund Getting Started Guide to setup your campaign using the Text2Fund Campaign Manager.

Then view the Optimize Your Text2Fund Campaign Guide to understand the during and after features of the Text2Fund Campaign Manager.





## Contact Us with Questions

The Text2Fund Team will provide help if you have any questions.  
Email questions to: [info@text2fund.com](mailto:info@text2fund.com)  
[www.text2fund.com](http://www.text2fund.com)



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