



Nonprofit

Year-End Marketing Checklist

Ready to get more donations this giving season? Use this checklist to get ahead of the game and finish the end of the year strong.

Promote big giving this holiday season

The holiday season is the perfect time to promote philanthropic giving. People are out shopping for their loved ones, so they're more open to making charitable contributions during the holidays. With a little planning, your nonprofit can make the most out of donors' urge to give big.

We're sharing checklists to help you plan each phase of your holiday marketing strategy: plan, take action, and post-holiday follow up. Following these checklists will guide you through your most important to-dos so you can be sure this season is your most prosperous yet!



By being aware of the different phases of a holiday marketing strategy, you can stay organized throughout the process and ensure you have a successful season!

Plan for key giving opportunities

Getting your donor lists ready is the foundation of a successful giving season. Use these to-dos to help develop well-thought-out segments to ensure your marketing efforts are focused and effective.

Brainstorm year-end attendance or event goals

- Set your goal
- Understand your ideal supporter
- Determine why they should support your cause

Build your year-end fundraising campaign with Campaign Builder

- Select your campaign goals, ideal audience, tone, industry, timeframe, and more in Campaign Builder to get a custom campaign created for you

Grow your email and SMS lists

- Entice people to join your email and SMS lists
- Create a pop-form for your website
- [Create a sign-up landing page](#) for your location and physical events using a QR code generated in Constant Contact

Note: Click the 'Share' button for sharing options including a ready-to-use QR code)

- Share your sign-up landing page on social, ads, and email

Segment your lists

- [Segment your list](#) to send more targeted, relevant messages
 - Average gift size
 - Level of supporter — long-term donors, business sponsors, volunteers, etc.
 - Recency and frequency of donations
 - Volunteers
 - Board members
 - Membership anniversary

Automate your email and SMS messages

- [Create automated communications](#) using Automation Path Builder for when your audience takes actions or hits milestones (subscribes to a list, has an upcoming birthday, clicks an email link, or donates)

Ideas for key giving opportunities

Get inspiration for calendar events and social trends to use as key giving opportunities.

Calendar holidays

- Thanksgiving (Fourth Thursday in November)
- [Giving Tuesday](#) (The Tuesday after Thanksgiving)
- Holiday Season (December)
- End of Year Giving (Late December)
- New Year's Day (January 1st)

Social trends

- [Create a social media challenge](#) for your team or audience to participate in during your fundraising campaign or event (share their take on the trend every time you hit a milestone in your fundraising campaign)

Examples:

- Commit to participating in a trending social media dance for reaching key milestones like raising \$100, \$500, or \$1,000+
- Have a key leadership team member lip-sync a trending sound on social media
- Reward your supporters for donating or sharing your fundraisers and events with a social media shout-out video

Take action on your year-end marketing plan

Now that you have grown and segmented your lists, it's time to promote your campaigns. These to-dos will help you encourage people to donate and bring a smile to someone in need this holiday season.

Update your brand online

- Highlight your year-end fundraising campaign on your website
- Ensure your website includes an option to donate (every page is ideal)
- Add a sign-up form to encourage people to join your list to show support
- Check all listings, review site profiles, and directory sites for outdated information

Update your branding in online marketing tools

- [Get your custom branding added in Constant Contact](#) using BrandKit (insert your website URL, and BrandKit will scan your website and add your logo, colors, and images)
- Double-check that your branding on any design websites you use is updated

Set up your donation and event pages

- Create your online donation page
- Create your online event registration page

Promote your campaign on social

- Encourage people to join your email list
- Schedule posts on social media to promote your campaign — use announcements, reminders, and last-chance reminders to donate
- [Add your donation landing page links](#) to your bio (consider using a link directory)

Create and send your campaign messages via email and SMS

- Use creative subject lines generated for you by Content Generator
- [Get engaging email and SMS content](#) using Content Generator
- Schedule emails and SMS messages to promote your campaign — announce, remind, and give people a last chance to donate
- Send a 'thank-you' email or SMS message

Use paid advertising

- [Use Facebook lead ads](#) to grow your email list before the giving season
- Use Facebook, Instagram, and/or Google Ads to drive traffic and donations from brand new audiences.

Prepare for ongoing success after the holidays

Even though the holiday season is over, you can continue the momentum of your fundraising efforts! Here are some actions you can take to ensure success throughout the year.

Review and take action

- Review your reporting and results to understand what worked and what didn't
- Further segment your list based on donation and engagement behavior
- Start planning using the content calendar for consistent marketing in the new year
- [Join the Constant Contact Community online](#) to get inspiration from other nonprofits in the [nonprofit forums](#)

Share your wins with your audience

- Celebrate your success — keep your audience informed (email and social)
- Create a video of you and your team thanking your audience for supporting your organization this year

Continue the conversation

- Showcase other ways they can get involved to support your organization
- [Send a survey](#) to let people share their feedback about the campaign
- Share a poll on social to get feedback about what your audience wants to see from your organization in the new year
- Send a message highlighting specific details on how they've contributed to the organization this year