

United Way Campaign Season Checklist

12 Strategic Steps to Run a Strong Campaign



Keep this checklist handy to help plan and execute your corporate campaigns efficiently and effectively during your busiest season.

1 **Set the Stage with Internal Alignment**

✓ **Start with reporting requirements.**

Clarify in advance what your corporate partners expect to receive in their campaign reports. These expectations will influence how you set up tracking, naming conventions, and campaign structure.

✓ **Map out employee access needs.**

Determine how employees will access your campaign: email invitation, intranet link, login credentials, or open access. Consider employees outside your standard roster: retirees, contractors, or dispersed teams.

✓ **Define business unit and department groupings.**

Group employees by business unit, location, or department in ways that support reporting, campaign goal-setting, and recognition.

✓ **Confirm your team's roles.**

Assign who handles each piece of setup and support: campaign build, testing, donor messaging, reporting, and partner communication. Prevent confusion by documenting responsibilities clearly.

2 Optimize for Donor Experience

✓ **Simplify the donor journey.**

Minimize steps and choices that may confuse donors. Streamline options based on what the employer offers (e.g., restrict designations to only certain agencies). Use pre-filled fields where appropriate to reduce friction.

✓ **Test the experience internally first.**

Before launch, run through your campaign as if you're an employee. Look for unclear instructions, broken links, or extra steps. Conduct test donations, explore donation forms, and review email messages.

✓ **Build for flexibility.**

Structure your campaign to allow for late employee additions, updated branding, or customizations—like write-ins or payment methods—without needing to rebuild the site.

✓ **Make recognition logic clear.**

Ensure employees and partners understand the criteria for donor recognition (e.g., giving levels, donor incentives, affinity groups). Communicate this early and reinforce it often.

Use giving incentives like raffle entries or tickets to motivate donors. Set clear eligibility rules—such as gift amount or timeframe—to align with your campaign goals and boost participation.

3 Communicate Strategically

✓ Align campaign messaging by audience.

Craft different messages for in-area and out-of-area employees if the campaign serves a wide geographic base. Tailor content based on the donor's profile such as gender or leadership status.

✓ Prepare your coordinators and champions.

Equip campaign leaders and ambassadors with talking points, goal tracking templates, and FAQs. Make it easy for them to answer questions and promote participation.

✓ Confirm email and communications readiness.

Test your ability to reach employees at scale. Ensure campaign messages are not being blocked or lost due to domain filters or technical issues.

✓ Schedule your checkpoints and wrap-up plan.

Establish dates for reporting, campaign adjustments, and post-campaign debriefs. Set expectations with your internal team and your corporate partners on when results will be shared.

A well-organized employee database is essential for delivering personalized giving experiences and streamlined campaign operations.

By segmenting data using accounts, campaigns, and business units, United Ways can tailor donation processes, messaging, and reporting to match the unique needs of each corporate partner.

