



Crowdfunding Strategy Guide

This guide is built from the best practices across thousands of successful campaigns. Your Patronicity coach is your partner — but this document is your reference. Use it before, during, and after launch. Throughout, we link to templates, examples, and additional resources.

THE FOUR PHASES OF YOUR CAMPAIGN

HOW TO USE THIS GUIDE

Each phase has its own section with an integrated checklist. Tasks are color-coded by role so you can divide work across your team.

PHASE 1

Preparing
for Your
Campaign

PHASE 2

Launching
Your
Campaign

PHASE 3

During Your
Campaign

PHASE 4

The Final
Push

Ideally, you should have a team of 2-3 people alongside you to share roles and tasks, and to help push and promote the campaign.



LEARN MORE:

- [Is Crowdfunding Right for Me?](#)
- [5 Crowdfunding Mistakes You Can Avoid](#)
- [How to Build a Powerhouse Crowdfunding Team](#)

PHASE 1:

Build Your Team

The strongest campaigns are built a few weeks before launch day. Phase 1 is about putting the people, the plan, and the foundation in place so you launch with momentum.

CAMPAIGN MANAGEMENT



The point person for the campaign, keeping the team on track and timeline moving.

MARKETING COORDINATION



Creating and implementing a social media strategy including emails, socials, press, and printed materials.

EVENT COORDINATION



Planning, implementing, and attending campaign fundraising events, launch parties, tabling, and speaking events.

DOING THE BOOKS



Working with the project's budget, donation tracking, thank-yous, and reward fulfillment.

TEAMS, NETWORKS, AND INFLUENCERS



Building the supporter network, identifying community influencers, and amplifying outreach.

CHECKLIST – Build Your Team

- ☐ **ASSEMBLE** your team and assign roles. Ideally, you should have 2-3 people who'll push and promote with you.
- ☐ **DESIGNATE** a single point person to stay in close contact with your Patronicity coach.
- ☐ **DECIDE** who has admin access to the campaign page. Be selective – admins receive every contribution notification.
- ☐ **IDENTIFY** community influencers – artists, educators, small business owners, elected officials – who can amplify the campaign.



PRO TIP:

Have each team member write their own potential donor list separately, then combine. This will allow you to find new connections and aspirational asks that could have been missed otherwise.

PHASE 1:

Identify Supporters & Gather Donors

One of the biggest predictors of campaign success is knowing exactly who you're going to ask before you launch. Build the list **before** the campaign starts so you're never staring at a blank page mid-campaign.



Existing relationships with friends and family



Local foundations, hospitals, volunteer groups



City Hall, city redevelopment commission



Chamber of Commerce, local tourism orgs



Historical societies, schools, alumni groups



Large corporations, small business owners



Religious orgs, local sports teams, senior centers, banks



Anyone located adjacent to your organization or project site!

CHECKLIST – Identify Supporters & Gather Donors

- ☐ **MAP** your existing reach — who do you and your team already have direct connections with?
- ☐ **CONNECT** with individuals or organizations who care about the type of work you're doing.
- ☐ **BUILD** a target donor list with at least 5 potential lead donors who can give \$250+.
- ☐ **TRY TO CONFIRM** at least one or two donations BEFORE launch. Early momentum matters more than people realize.
- ☐ **LIST** the newsletters, email lists, and social accounts you can tap to share the campaign.



PRO TIP:

The first donation pulls in the next ten. Aim for at least 10% of your goal committed before launch day — quietly, in advance — so the page already shows momentum when the wider community arrives.



LEARN MORE:

- [How to Make Your Crowdfunding Ask](#)
- [How to Tell Your Story in Crowdfunding](#)
- [5 Ways to Amplify Your Crowdfunding Campaign](#)
- [How to Develop a Donor Engagement Strategy](#)

PHASE 1:

Plan Your Calendar & Outreach

Your campaign will run 30-60 days. To give yourself enough time, build the materials and the calendar **before** you launch – then the campaign month is just execution.

Balance reaching out to people who you're confident will support your campaign, to get the ball rolling, and people and organizations you're less connected with, but who you're hoping will provide larger donations.

CHECKLIST – Calendar

- ☐ **CREATE** a campaign calendar showing who reaches out to whom, week by week.
- ☐ **CROSS-REFERENCE** local community events – festivals, markets, Rotary, Lions Club, Chamber events – for fundraising opportunities.
- ☐ **PLAN** at least one campaign event: launch party, dine-and-donate, or a speaking slot at an existing community event.

CHECKLIST – Outreach Materials

Have these ready BEFORE launch. Every piece carries your campaign short URL with a clear call to donate.

- ☐ **DRAFT** solicitation email and text templates – both mass and personalized versions.
- ☐ **CREATE** thank-you email template, with an "ask to share" line built in.
- ☐ **BUILD** social media calendar – daily or every-other-day posts pre-scheduled.
- ☐ **OUTLINE** newsletter content for your org and any partner orgs that will share.
- ☐ **PRINT** materials: posters, postcards, business cards. Utilize the **QR Code Generator** and **Short URL** on the Elevate tab to add to flyers and newsletters.
- ☐ **DRAFT** press release ready for post-launch.
- ☐ **DESIGN** mailed donation cards (optional but high-converting).



PRO TIP:

Use the Campaign Short URL and QR code from the Elevate page on posters, socials, and around town. Use Canva to brand your campaign materials.



LEARN MORE:

- [Timing is Everything for Your Crowdfunding Campaign](#)
- [Sample Campaign Calendar](#)
- [Crowdfunding Campaign Marketing Templates](#)

PHASE 1:

Define Your Giving Levels & Rewards

Giving Levels are the dollar buttons patrons see at checkout. Good levels nudge patrons to give one tier higher than they planned. We encourage intangible rewards, like thank-you notes or impact rewards that explain what the donation will be able to cover for the project.

CHECKLIST – Giving Levels

- ☐ **SET** your fundraising goal based on real project budget.
- ☐ **BUILD** at least 5 giving levels (e.g. \$20, \$50, \$100, \$500, \$1,000).
- ☐ **TITLE** each level with something fun or clever and themed to your project, organization, or community.
- ☐ **CONFIRM** rewards are easy to fulfill and cost-effective – aim for the Giving Level to be at least 3x the reward cost.
- ☐ **USE** your budget as basis, giving your patrons a tangible item to “fund.”



CHECK OUT THESE EFFECTIVE EXAMPLES:

River Ramble Natural PlayScape



Green Brain Comics Recovery



Golden Needle Tailor Shop



PRO TIP:

Download supporters and their selected giving levels under the PATRONS tab on your Patronicity page. You're responsible for fulfilling rewards – keep a tracker so nothing slips.



LEARN MORE:

- [How to Build Giving Levels for Your Crowdfunding Campaign](#)
- [Creating a Budget and Goal for Your Crowdfunding Campaign](#)

PHASE 1:

Define Your Giving Levels & Rewards

This is a great chance to get creative and motivate patrons to support your project! Here are some more examples of the types of giving levels that have led project leaders to success:

Give \$25 or more

Seed Sower

Your gift helps plant the seeds for a healthier, local food system.

Give \$100 or more

Harvest Helper

Your donation supports the vital work of growing and delivering fresh, local produce to those in need. Harvest Helpers will be mentioned on the Lost River Co-op Facebook Page.

Give \$250 or more

Farmstead Friend

Your support helps provide ongoing resources for local farmers and the essential transportation for fresh food delivery. Farmstead Friends will receive a personalized thank you card as well as mention on the Lost River Co-op Facebook Page.

[Farms to Friends Farm Stand](#)

GRATITUDE

Handwritten thank-you card, social media shout out, recognition on website, etc.

IMPACT REWARDS

Describe what the donation will be able to cover, like \$15 will plant 1 blueberry bush, etc.

PATRON RECOGNITION EVENTS

Invite your patrons to an event just for them!

TANGIBLE REWARDS

Shirt, sticker, tote bag, mug, etc.

Note: this will work best if you already have merch on hand and don't have to spend extra funds.

COUPONS, DISCOUNTS, AND GIFT CARDS

Contribution of \$250 gets a 25% discount, give \$100 and get a \$25 gift card at a supporting local business, restaurant, etc.

NAMING RIGHTS

An element of your project that can be named after a very generous patron.

DEDICATION PLAQUE OR MURAL WALL

A plaque around your project that lists all/some of the patrons at different levels.

EXPERIENTIAL REWARDS AND EVENTS

Behind-the-scenes visit as project evolves, coffee with the project team, a 30 minute Q&A session, etc.

PHASE 2:

Launching Your Campaign

Launch day momentum sets the tone for your entire campaign. Front-load support — your team, your inner circle, your already-committed patrons — so the page already has activity when the wider community sees it.



WHAT SUCCESS LOOKS LIKE:

Every team member and influencer has personally donated (even just \$5) to get the ball rolling. Your launch announcement has reached your full email and social network.

CHECKLIST – Launch Day & First 48 Hours

- ☐ **HOLD** a final team check-in 24 hours before going live.
- ☐ **ENSURE** every team member and influencer makes a personal donation (even \$5) in the first hour. This is a baseline expectation.
- ☐ **SEND** mass announcement email and text blast to your full contact list.
- ☐ **POST** launch announcement across all social channels.
- ☐ **SEND** press release to local newspapers, radio, and blogs. Utilize the **QR Code Generator** and **Short URL** on the Elevate tab to add to flyers and newsletters.
- ☐ **DISTRIBUTE** newsletter via your org and any partner orgs.
- ☐ **HOST** or attend your launch event.
- ☐ **BEGIN** tracking donations and sending personalized thank-you notes.



PRO TIP:

Personal asks convert at far higher rates than social media posts. Have every team member personally text or email at least 10 close contacts in the first 48 hours.



LEARN MORE:

- [4 Ways Using a Short URL Can Elevate Your Crowdfunding Campaign](#)
- [How to Make Your Crowdfunding Ask](#)

PHASE 3:

Running Your Campaign

The middle of a campaign is where most projects lose momentum. Don't go silent. Keep the cadence steady — fresh content, new asks, new angles every week. Donors often need to be asked three times before they give.



WHAT SUCCESS LOOKS LIKE:

Donations come in regularly — not just on launch day and the final week. Thank-yous go out within 24 hours of each donation. You've adjusted your strategy based on what's actually working.

CHECKLIST – Running Your Campaign – Weekly Tasks

- ☐ **HOLD** weekly team check-ins to review progress and adjust strategy.
- ☐ **TRACK** which outreach methods are working — double down on what's converting, drop what isn't.
- ☐ **SEND** a fresh mass email each week, tailored to a different audience segment.
- ☐ **POST** fresh social content regularly — progress updates, patron highlights, behind-the-scenes.
- ☐ **FOLLOW UP** with press for stories on campaign progress and the deadline.
- ☐ **CONTINUE** distributing print materials in the community.
- ☐ **CONTINUE** personal outreach — calls and emails to potential new patrons.
- ☐ **HOST** or attend events with a clear ask: "Pull out your phone, go to [URL], donate now."
- ☐ **SEND** personalized thank-you notes within 24 hours of each donation. Include an ask to share with one friend.
- ☐ **TRACK** offline donations alongside online — keep your patron list current.



PRO TIP:

At every event, refresh your campaign page in real time as donations come in. Watching the number tick up live creates immediate proof and motivates the room. Bonus: you can thank patrons out loud as their names appear.



LEARN MORE:

- [Adding a Stretch Goal to your Crowdfunding Campaign](#)

PHASE 4:

The Final Push

The last week of a crowdfunding campaign has built-in urgency. Use it. A meaningful share of donations come in the final stretch — don't ease off when you're close. And whatever the outcome, end the campaign well: the patrons who supported you are likely to be your first donors next time.



WHAT SUCCESS LOOKS LIKE:

Daily countdown content goes out for the last 7-10 days. Every committed-but-unconverted donor has been personally followed up with. Your team has done one final coordinated push to their networks.

CHECKLIST – Final Week

- ☐ **HOLD** a team check-in to coordinate the final push.
- ☐ **POST** daily social media countdown for the last 7-10 days ("3 days left!", "24 hours!").
- ☐ **ENSURE** every team member and influencer makes one final appeal to their networks.
- ☐ **REACH OUT** with a personal call or email to every potential donor who said they'd give but hasn't yet.
- ☐ **HOST** a wrap-up celebration to drive last-minute donations.

CHECKLIST – After You Hit Your Goal

- ☐ **FINALIZE** your patron list and confirm reward fulfillment plans.
- ☐ **SEND** final thank-you emails to all patrons.
- ☐ **BEGIN** reward fulfillment promptly — the sooner the better for patron trust.
- ☐ **SEND** a campaign success announcement with thanks.

IF YOU DON'T HIT YOUR GOAL

Falling short isn't failure — most campaigns raise meaningful funds even when they don't reach their full goal. Talk to your Patronicity coach about the next steps.



PRO TIP:

At every event in the final week, refresh your campaign page in real time so the room can watch the number tick up. The shared moment of crossing the goal — or pulling within reach — is one of the strongest stewardship moments you'll get.