



End of Year Giving Campaign Checklist

Site Optimization

- Does our donation platform work?
- Are we following [landing page best practices](#)?
- Are we following [donation form best practices](#)?
- Are our [Google Analytics goals](#) configured and current?
- Do we have an automated thank-you email?
- Do we have a [donation-ask pop-up](#)?
- Did we [build a campaign dashboard](#)?

Planning

- Determine days and times users are going to our site
- Determine days and times most successful for email open rates
- Determine subject lines that drove the highest open rates
- Determine email designs and CTAs that drove the highest click-through rates
- Segment email lists for tailored messaging (donation amount or donation behavior)
- Build a send schedule including:
 - Days and times
 - Messaging
 - A/B testing elements
- [Design an email template](#)
- Compile visual assets

Building & Scheduling

- Clear internal names for all emails
- Human send-from name
- Engaging subject lines
- Preview text
- [Campaign tagged](#) links
- Hyperlinked images
- Large, clear CTA buttons
- Direct asks

Nurturing

- Track A/B test results
- Update later iterations based on A/B test results
- Send [personal thank-you messages](#) (top + repeat donors)
- Send [fun thank-you messages](#) to other donors

Reporting

What worked and what didn't? Focus on:

- Subject lines
- Body copy and calls-to-action
- Send days and times
- Segments