



UNITED WAY
Greater Cleveland

WORKPLACE CAMPAIGN COMMUNICATION PLANNER

The DonorPoint platform is flexible and customizable to meet the individual needs of your company. This document is a tool to help you in developing and running a successful campaign. Answering the below questions will help you, your team, and United Way of Greater Cleveland (UWGC) determine your specific needs. If you have any questions, contact your UWGC Account Manager.

Company Name: _____

UWGC Account Manager: _____

Email Communications

One in 4 donors say that e-mail is the communication tool that most inspires them to give to charity.

DonorPoint allows for flexible communications when a donor's email address is supplied. Launch information and reminder e-mails can be sent automatically. Reminders will be sent only to employees who have not responded at the time of the e-mail.

Would you like UWGC to send system generated emails for your campaign?

☐ Yes ☐ No

If YES, who will sign-off on the campaign correspondence?

Name: _____

When an employee hits REPLY to an email sent via the DonorPoint (invitation, reminders, receipt), who should receive that email?

Name: _____

When emailing employees, will content links and embedded videos be accessible?

☐ Yes ☐ No

Other: _____

For each pledge or donation, DonorPoint will send a branded confirmation, which serves as a receipt and tax document. DonorPoint can be used to send a Campaign Wrap-Up Message to donors or employees. This message can include a final 'Thank You' from your CEO or Annual Campaign team as well as a report of the campaign results against goal.



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Messaging Schedule

The Launch, Soft Close, Hard Close, and Payroll File dates will help inform and structure the messaging schedule. Use the dates below as references for when to send Campaign Launch, Reminder, Last Chance, Lapsed Donor, and Wrap-Up Messages

Launch Date: _____

Hard Close Date: _____

Soft Close Date: _____

Payroll File Date: _____

Message Type	Date	Time
Launch		
Reminder #1		
Reminder #2		
Reminder #3		
Reminder #4		
Lapsed Donor		
Last Chance		
Additional		



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Donor Segmentation

The DonorPoint system allows for standard donor segmentation. Donors will receive different messaging in accordance with their UWGC giving in the prior year.

Standard UWGC donor segmentation:

- **No Donation**
- **Donation < \$999**
- **Humanitarian Society (Donation of \$1,000+)**
- **Philanthropist Society (Donation of \$10,000+)**

The DonorPoint system allows for custom donor segmentation according to your company's needs. If applicable, let us know below how you would like to segment your donors for messaging purposes.

Custom Donor Segmentation:

**Donor segmentation is not available with custom messaging.*

Social Media

United Way is active on multiple social media platforms, including Facebook, Instagram, and LinkedIn. Please indicate below which platforms your organization uses and if UWGC may acknowledge your company's workplace campaign on social media.

If your company utilizes social media, which platforms are most active:

☐ Facebook ☐ Instagram ☐ LinkedIn

List Social Media Handles: _____

May United Way of Greater Cleveland acknowledge your company's workplace campaign via social media?

☐ Yes ☐ No

For United Way of Greater Cleveland Use Only

Company Name: _____

UWGC Account Manager: _____

Company FRID: _____

Employee Campaign Manager: _____