



YEAR-END APPEAL CHECKLIST

IDENTIFY IMPACT

- ☐ WHAT PROGRAM, EVENT, OR RESOURCE DO YOU (PLAN TO) PROVIDE THAT COULD USE ADDITIONAL FUNDING?
- ☐ WHAT DIFFERENCE WILL THIS MAKE IN SOMEONE'S LIFE?
- ☐ REMEMBER: YOU ARE NOT THE IMPACT. ANY DEFICIT YOU MAY HAVE SHOULD NOT BE THE FOCUS

SET A FINANCIAL GOAL

- ☐ INCLUDE THE TOTAL COST OF IMPACT IN YOUR BUDGET, INCLUDING PAYMENT FOR YOUR TIME
- ☐ CONSIDER THE CAPACITY OF YOUR NETWORK

CREATE A 3 TO 5 TOUCH STRATEGY

- ☐ WARM-UP: THANK YOUR CONTACTS FOR THEIR SUPPORT AND SHARE YOUR MINISTRY'S WORK + ACCOMPLISHMENTS
- ☐ STRONG ASK: BE BOLD. PROVIDE A SPECIFIC AMOUNT AND DEADLINE.
- ☐ REMIND THEM OF THE FINANCIAL GOAL AND THE IMPACT.
- ☐ SEND A TEXT OR VOICEMAIL REMINDER IN THE LAST 3 DAYS OF THE YEAR.

SEGMENT YOUR LIST

- ☐ HIGH CAPACITY PARTNERS: CONSIDER \$1,000+ AND RECEIVE THE MOST CUSTOMIZED COMMUNICATION
- ☐ MID-LEVEL PARTNERS: CONSIDER \$200 TO \$500 AND RECEIVE LESS CUSTOMIZED COMMUNICATION
- ☐ BASE LEVEL PARTNERS: CONSIDER LESS THAN \$200 AND RECEIVE PERSONALIZED BUT NOT CUSTOMIZED COMMUNICATION

WHICH CHANNEL WILL YOU USE FOR EACH TOUCH?

- ☐ DIRECT MAIL
- ☐ EMAIL
- ☐ TEXT MESSAGE
- ☐ SOCIAL MEDIA

CREATE A TIMELINE

- ☐ WHEN DO YOU WANT YOUR CONTACTS TO RECEIVE EACH COMMUNICATION?
- ☐ HOW MUCH TIME IS BETWEEN NOW AND THEN?
- ☐ WHEN CAN YOU SET ASIDE TIME EACH WEEK TO IMPLEMENT YOUR PLAN?
- ☐ WHO DO YOU NEED INPUT FROM? HOW LONG WILL IT TAKE?