



## A. Pre-Campaign Planning

Build Document/Build Survey should be completed and submitted eight weeks prior to campaign kickoff. This is the required technical information to set up the campaign.

## B. Communications

### Kickoff/Welcome Email

Sent to each employee to kick off campaign with instructions on how to access the online pledge system with a personalized URL

**\*\*\* Please do not pass this email on to anyone else, as this URL is personalized for each employee \*\*\***

- **Sender:** Email may originate from sender of your choice, such as CEO/President or Campaign Chair
- **Subject:** Choose Greatness During Campaign 2017
- **Content:** Can be customized
- **IT** should take steps to ensure emails are not blocked as spam or sent to junk email box

### Non-Respondent Email

Sent to those employees who have not yet responded with a pledge decision

- **Set up schedule to run the non-respondent report**
- **Set up schedule to automatically generate non-respondent emails**
- **Sender:** Email may originate from sender of your choice, such as CEO/President or Campaign Chair
- **Subject:** Be a hero in Kansas City
- **Content:** Can be customized

### Thank You Email

Automatically generated to each donor immediately following their pledge, summarizing their pledge and designation information

- **Standard email; non customizable**

## C. Step-by-Step Guide on How to Use ePledge

## D. Administrative Functions for Employee Campaign Managers (ECMs)

## E. Frequently Asked Questions

## F. Campaign Set-Up Timeline

## G. Data File Layouts

Company Data File Layout

Payroll Deduction Remittance File Layout