Humanitru
Customer Success Team
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Humanitru Pre-Event and Post-Event Management

Pre-event Email

So you're hosting an event? Here are some things you can do using Humanitru plus some best practices guides to consider.

Use Humanitru's Alpine database to decide who to invite. Run a report to combine your supporter segments. Segments to consider:

- Donors
- Members
- Volunteers
- Past event attendees
- Alumni
- Program attendees

**Consider looking at active and lapsed segments from all of these categories as events can be a great way to re-engage people in your mission*

Then send your segmented list an email save-the-date or invitation using your Mailchimp or Constant Contact integration or preferred email marketing platform.

Do you track demographics? Consider sending a mailed invitation to supporters over a certain age or use the geographic filter to send a mailed invitation to those who live nearby via the Mailings integration, add a QR code to the mailed invitation to make it easier for your supporters to register online

Go back after a week or so and check who opened the invitation and who clicked on the purchase ticket link but didn't actually purchase a ticket and create follow up tasks for outreach.

Communications

Frequent touch points are a must and should be a priority.

- You can't start early enough to build hype - Here is a detailed article from Call Hub on event planning: **How To Plan A Successful Fundraising Event**
- This should be a multi-channel approach (social media, email, direct mail, direct outreach)
- Be sure to use QR codes connected to your Evergreen event page and Donation Landing Page on all printed materials to make it easy for people to register, donate, or purchase sponsorships
- Set up scheduled notification emails in Humanitru Evergreen so you can "set it and forget it"
- According to industry best practices, these event reminders should go out three times before your event. One week before the event, one day before the event and on the day of the event.
- Technology is hard - be sure to communicate early with supporters what the technology situation will be, especially in the age of Covid
- Offer a way for your supporters to reach out to you if they are having issues with technology or have concerns about their technology skills. Include contact information in all communications, including email receipts set up in Humanitru Evergreen.

Trainings

- Schedule pre-event trainings with your Customer Support Manager and everyone who will be using the system so you're prepared for handling things like
    - Checking people in
    - Closing out online auctions
    - Loading items to a supporters tab
    - Putting credit cards on file
    - Recording a cash/check donation

- Watch our mini-webinar on Virtual Events Mythbusting for Fundraisers for tips and tricks on handling virtual and hybrid events.

- Feeling overwhelmed about managing the event logistics on the big day? Ask your Customer Support Manager for recommendations for companies offering event management services like Nonprofit Learning Lab.

Testing

Run a test from start to finish - we cannot stress this enough!

Technology is hard, you can never be too prepared and you do not want to be surprised the day of the event. Worse, you don't want your supporters to be surprised.

- Understand the experience your constituents will have so that if they need help, you can be there

- Understanding that experience may help you in shaping your communications with supporters leading up to the event

- Create test tickets so you can see the entire user experience start to finish for yourself and tweak anything you find confusing

- Test all email receipts and scheduled acknowledgements and test all links you're including in email receipts and acknowledgements to make sure they are working properly (sometimes people change things on their event that changes the links and they forget to update them in their email receipts or pre-scheduled email notifications)

- Don't only test tickets, but run mock check in and check out processes with the volunteers or staff that will actually be doing these tasks day of so you can get ahead of any questions or schedule additional training with your Customer Success Manager

- If you are using your events Wifi to run checkins and process transactions, we highly encourage your to visit the site to test their Wifi connection. Its always a good idea to hav e a back up in case you have to move over to using a cellular connection.

Campaigns

- Be sure you understand how to see where your event data lives and how it maps over from Evergreen into your Alpine database in the Campaigns section.

Additional things to consider

- Set up notifications you'd like to receive before and during the event. Would you like to be emailed every time someone purchases a ticket? You can do that under Settings in your Alpine database - use this video for help on how to do that!

- If you would like supporters to receive tax deductible information, be sure to fill out all FMV fields in Evergreen so that their automated close out receipts include that information

- If you'd like to send out mailed thank you letters after the event, be sure you've set up your page to collect address information

- Do you need access to live data during the night, for example, will you be making live announcements throughout the day of how much you've raised? If so, be sure you understand how to access that data before the event.

- If you are using our mobile bidding platform, be sure to check out that guide here.

Post-event Email

So you just finished your event, we hope it was wildly successful! Once you catch up on some R&R, here are some things to consider doing.

What should you do in Evergreen?

- Close people out if they have not already been.
- Supporters will receive itemized email receipts that include tax deduction amounts that will be automatically calculated if you used the FMV fields in Evergreen

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JM

Your donation was successfully processed, Jody.

A Message to You

Thank you for your generous gift! We appreciate your interest and financial commitment - without the aid of all of our supporters, we wouldn't be where we are today.

DETAILS

Organization	Htru Demo
Campaign	My Event Page
Amount Charged (Credit Card)	$1,010.00
Note	Paddle Raise: $1,000.00 (Tax-Deductible Amount: $1,000.00) Mulligan: $10.00 (Tax-Deductible Amount: $10.00)
Timestamp	March 24, 2021 8:01PM EDT

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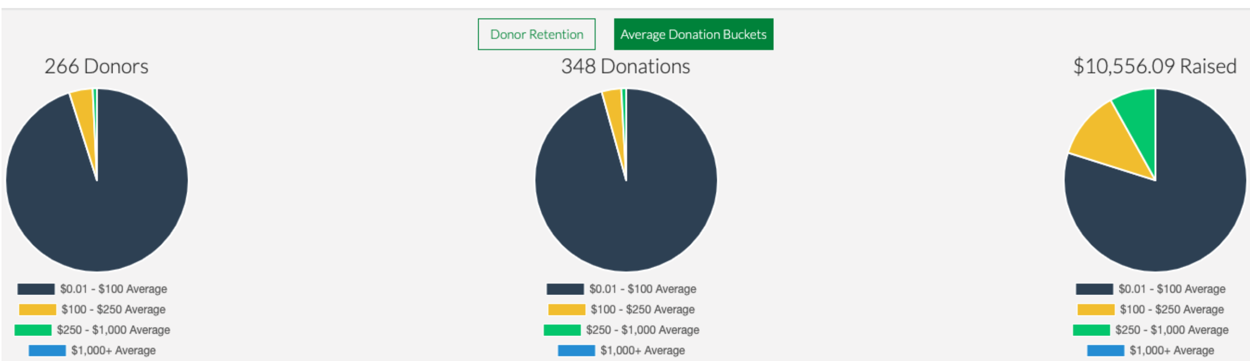
Look at your data in Alpine

- How much money did you raise?
- Who donated for the first time at your event?
- Who participated in your event for the first time?
- What was your average donation?
- Who donated above a particular threshold that you should thank personally?
- What were your donation buckets?



Did you re-engage any lapsed segments (donors, members, program attendees, past event attendees, volunteers)?

**Create a follow up action plan using Alpine's task management capabilities to continuously engage the supporters you captured during your event throughout the year.*

Thank Yous

Get as targeted as possible so people feel special and seen. For example, if a volunteer attends your event and donates, you should recognize them as both a volunteer and for their donation in your thank you.

- Pull these “special supporter segments” in your Alpine reporting feature and then used your Mailchimp or Constant Contact integrations or the Humanitru Acknowledgements interface to send your different segments different thank yous

- Post a thank you message on your website

- Post a thank you message on your social media channel

- Tell them how they helped you accomplish your goal and how much you raised

- Here is another great resource for crafting Thank you Letters Donors will Love.