

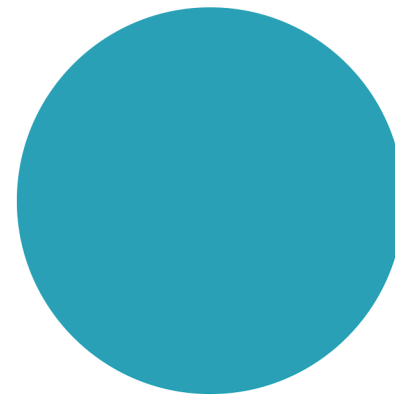
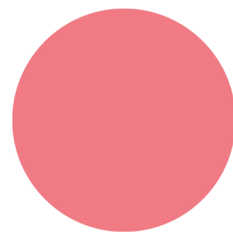
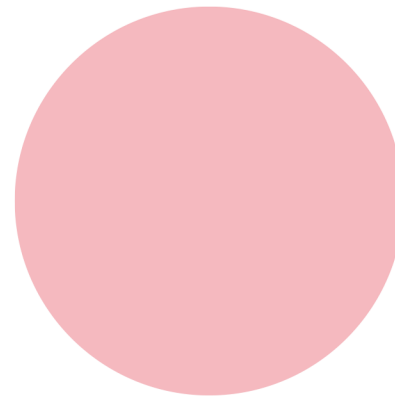
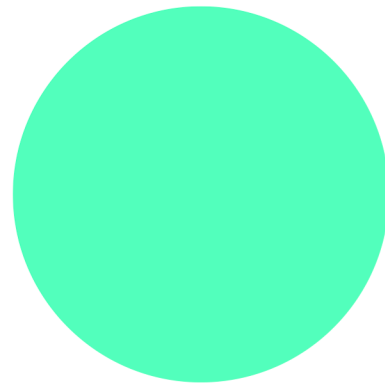
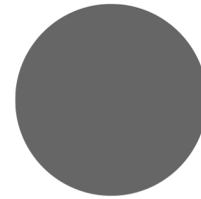
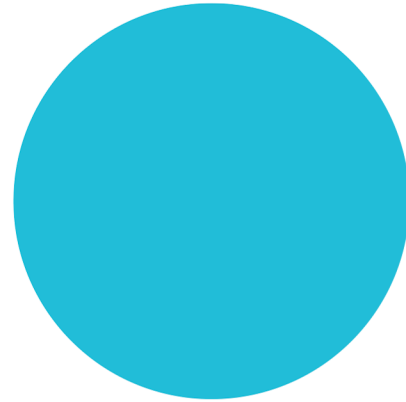


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# WORK SHEETS

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**SUCCESS**

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#### Disclaimer

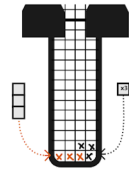
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# Crowdfunding fever

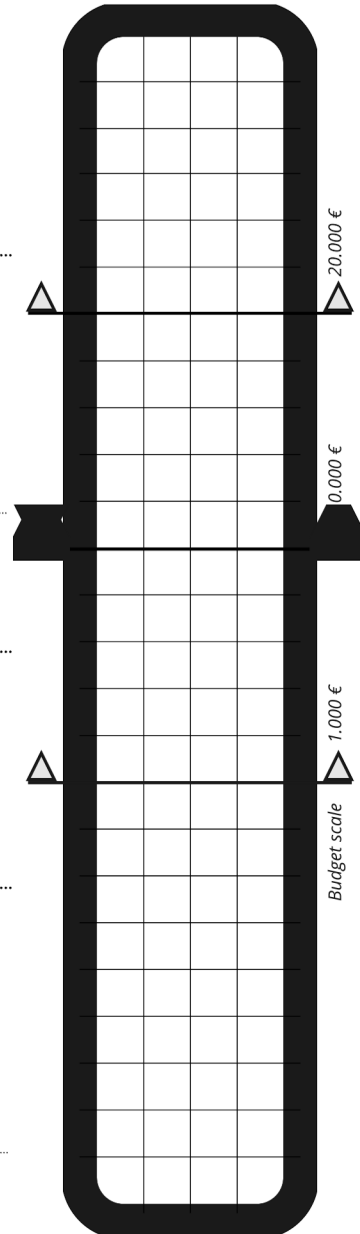
Team name \_\_\_\_\_

## Can crowdfunding work for us?

Let's discover it answering the following question. Depending by the answer we will move the blocks to the bottom of our thermometer hoping to reach the minimum temperature and pass to the next phase: design our campaign.



Ready to design



Work on what you miss

## Do we have a goal to fund?

- No, we need money for our annual budget / budget shortfall
- Yes, but we're really bad explaining it / it's complicated
- Yes and if we reach it, you will see a tangible change

## Do we have a product / service whose desirability we need to validate?

- No
- Yes, but it's still an idea
- Yes and we are testing one/more prototype(s)
- Yes and we are running a pilot / we're ready for production
- Yes and the production has started / we're ready to deliver it by the end of the campaign
- Yes and we can use it as a solidarity perk (pay the service for someone in need)
- Yes, and we can use it as a perk
- Yes and we can generate different perks

## Why are we running this campaign?

- We need money
- We want to communicate the value of our work

## Do we have a team who will work on the campaign?

- No
- Yes, only one person
- Yes, between 2 and 3 people
- Yes, between 4 and 5 people
- Yes, more than 5 people

## Team skills & assets

Let's add squares for each person in the team with that skill / asset

- Storytelling
- Marketing
- Video making & editing
- With a big network
- Problem solving mixed with lateral thinking
- Visual Design
- Influencer
- Corporate fundraising

## Do we have a community to mobilize?

- Are we within one or more groups of people sharing or having certain characteristics, attitudes and/or interests in common?
  - Yes and we are meeting time-to-time on site
  - Yes and we are regularly meeting on site
  - No
  - Yes, but we're not interacting so much
  - Yes and we are meeting time-to-time online
  - Yes and we are regularly meeting online
- Yes and we're ...
  - 10
  - 30  x3
  - 60  x3 x3
  - 100  x3 x3 x3
  - 200  x3 x3 x3 x3
  - > 300  x3 x3 x3 x3
- Extras:
  - Yes and we're doing projects / activities / events together
  - Yes and we do have an online space where we spontaneously interact

## Do we have a database containing all our contacts?

- No
- Yes and we have the following amount of contacts:
  - 200
  - 500
  - 1,000
  - 2,000
  - 3,000
  - > 5,000

## Do we know how to deal with financial reporting?

- No, we're wandering in the dark
- Yes, we're going to register every contribution as income
- Yes, we're going to register every contribution as donations
- We're running an equity crowdfunding or peer landing

## Can we specify every costs we need to cover with the money we will ask for?

- No
- Yes, but we don't know the amount
- Yes and we know already the total amount
- Yes and we already considering all the crowdfunding costs

## Extras

Let's add what we think will make us readier for the campaign

- A team member sibling is an influencer
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Impact based project pitch

Team name \_\_\_\_\_

Budget to be crowdfunded

Project name

## Inputs

*What is put in the initiative*

Resources (capital, human, data, etc.) invested in the activity. eg.

- \* Staff competence & skills
- \* Budget
- \* Equipment
- \* Existing methods
- \* Existing data
- \* Existing theoretical models
- \* Existing observations

START  
HERE →

## Activities

*Primary activity of the initiative*

Concrete actions of the team. eg.

- \* actions,
- \* observation,
- \* experiments,
- \* studies,
- \* data creation and analysis
- \* project management
- \* Stakeholder engagement



## Outputs

*Result that can be numbered*

Tangible results from the completion of activities. eg.

- \* Publications, Reports
- \* New methods
- \* New research tools
- \* New data
- \* New technical solutions
- \* New theoretical models
- \* New observations



## Outcomes

*Social change*

Change resulting from the activity. eg.

- \* change in working practices,
- \* proposals,
- \* technology, etc.
- \* policy
- \* Awareness raised
- \* Trainings accessed b. users
- \* Adoption of new rules & governance
- \* Solutions & Standards



## Impacts

*Long term effects produced*

Effects, not including the actions from others. eg.

- \* social, environmental, economic.
- \* Long-term effect on, change or benefit to the economy, society or environment
- \* What is the vision, the end goal that your research can contribute to?

← THEN  
HERE

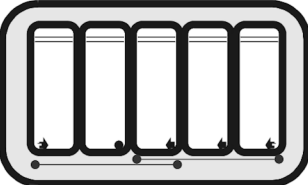
Planned work

Intended results



# Brainstorming Canvas

Team name \_\_\_\_\_



Once we pitched our project in front of a crowd, let's make them some questions helping us having different perspectives about our project.

**Project name** \_\_\_\_\_

1 / What do you like about the project?

2 / What words would you use to explain the project to your friends? and to the friends of your friends?

4 / If you were one of the potential backers, what would motivate you to donate?

3 / Who are the potential backers?

# Sensemaking Canvas

Team name \_\_\_\_\_

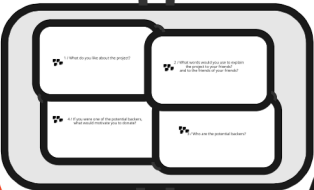
Project name \_\_\_\_\_

**Copywriting**  
Title & Subtitle

**Potential backers**

**Rewards**

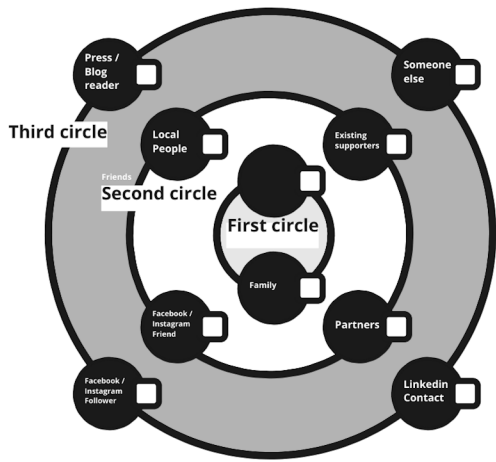
**Partners**



# Crowdfunding Personas

Team name

What group is our persona part of?



Anagraphic overview: let's describe our potential backers as we were reading their ID card.

Name

Age

Born in:

Resident in:

Profession

Family

What is our personas saying often that better describes them?

“  ”



Like

What do our personas like to do?



Don't like

What do our personas don't they?

Once we get an idea of how our real potential backers are done, let's try to investigate what they are looking for in their lives that they can find in our campaign.




Needs


What needs could our personas satisfy by backing our campaign?





Dreams

What dreams do they have resonating with what we tell about our project?

 **First attempt** Let's create a title that won't allow our potential backers to understand what the campaign is about

 **Second attempt** Let's create a title that will accurately describe our campaign

 **Third attempt** Let's create a title that will make our potential backers fall in love with our campaign

 **Final attempt** Let's use the second and third attempt to give our campaign a title (using maximum 8-10 words) that will allow our potential backers to understand the main value we want to share with them

We have the possibility to explain the title in 220 characters: let's use it to give our potential backers a glance of what they will find by reading further or watching the video



# Rewards Canvas

Team name \_\_\_\_\_

Let's set a minimum amount to get each reward

Pledge \_\_\_\_\_ € or more

Pledge \_\_\_\_\_ € or more

Pledge \_\_\_\_\_ € or more

Pledge \_\_\_\_\_ € or more

Pledge \_\_\_\_\_ € or more

Let's give a name to each reward (be funny and creative)

Name \_\_\_\_\_

Description \_\_\_\_\_

Name \_\_\_\_\_

Description \_\_\_\_\_

Name \_\_\_\_\_

Description \_\_\_\_\_

Name \_\_\_\_\_

Description \_\_\_\_\_

Name \_\_\_\_\_

Description \_\_\_\_\_

Let's describe the reward in a sentence. Our potential backers need to understand what this is about in a few words: let's be short but precise, we're promising something important for them

Looking at the group of our possible backers we clarify for whom each reward is designed for

Potential backers \_\_\_\_\_

Potential backers \_\_\_\_\_

Potential backers \_\_\_\_\_

Potential backers \_\_\_\_\_

Potential backers \_\_\_\_\_

Let's specify if the reward has a cost (this will help to define a budget)

Costs \_\_\_\_\_

REWARDS

Costs \_\_\_\_\_

REWARDS

Costs \_\_\_\_\_

REWARDS

Costs \_\_\_\_\_

REWARDS

Costs \_\_\_\_\_

REWARDS

Let's clarify what tasks we need to do to "create" and give each type of reward we've designed



# Communication Action Canvas

Team name \_\_\_\_\_

Let's clarify what is the objective of each communication action

	Objective	Objective	Objective	Objective	Objective
	↑	↑	↑	↑	↑

Let's describe the action in a sentence

We define what channel we're going to use in each action

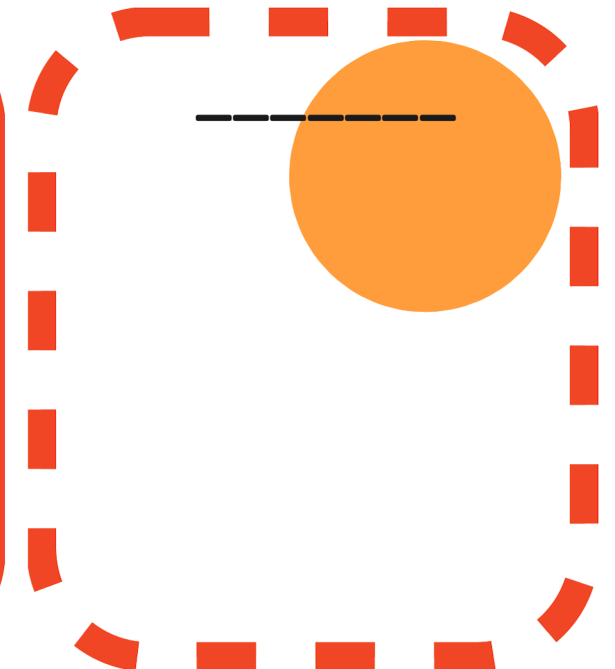
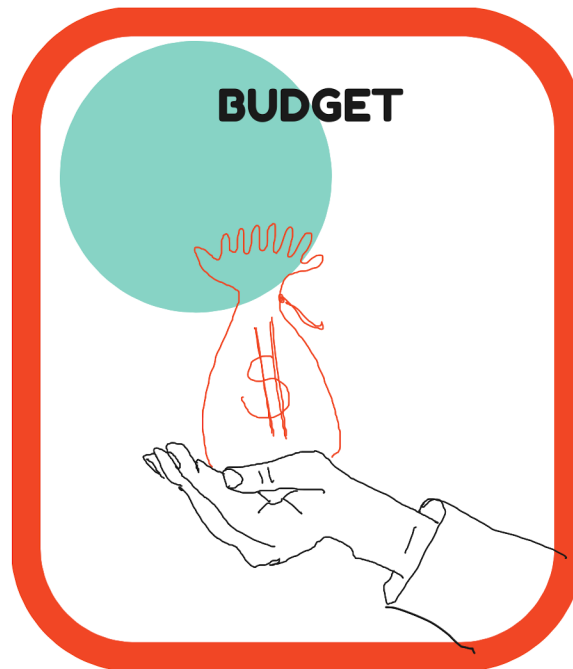
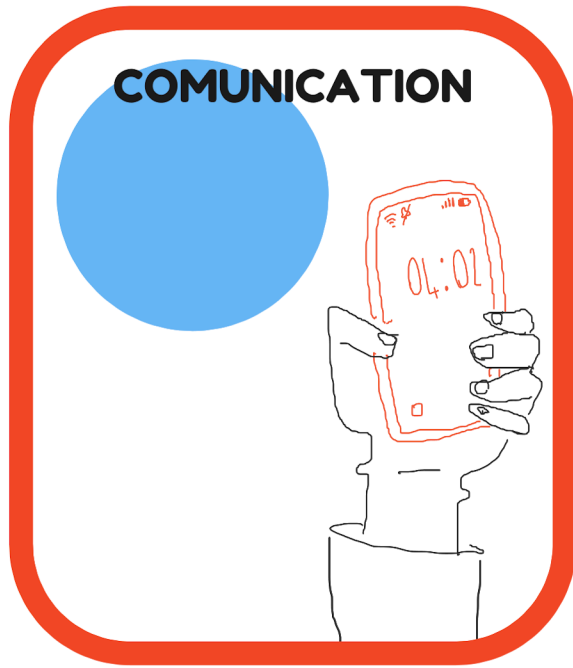
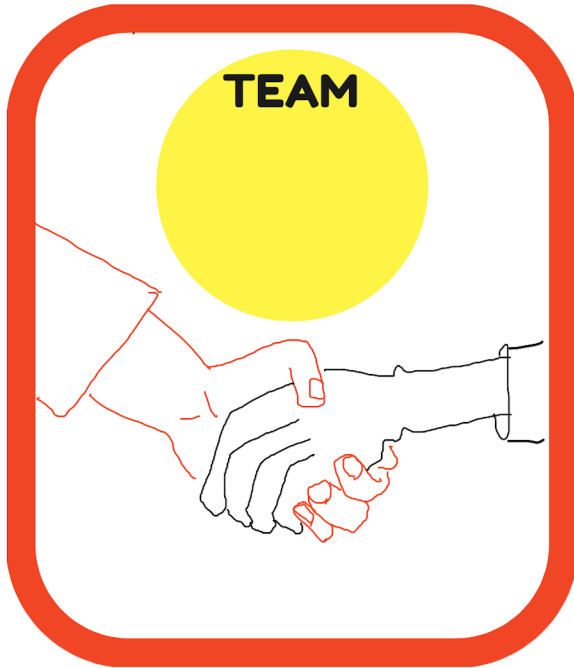
Looking at the group of our possible backers let's clarify who each action is addressing

We define what partners we need for each action

Let's clarify what tasks we need to do to deliver each action.


	Channels	Channels	Channels	Channels	Channels
	↔	↔	↔	↔	↔
	Potential backers	Potential backers	Potential backers	Potential backers	Potential backers
	Partners	Partners	Partners	Partners	Partners

# Golden Rules



# Team - Golden Rules

**Draw your network plan**  
 ---  
 list your networks as a chart



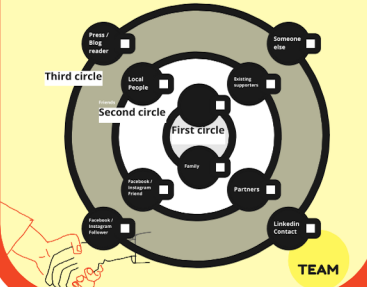
TEAM

**Create your network database**  
 ---  
 list your networks in your favourite tool



TEAM

**Divide your network in circles**



TEAM

**Mark those supporters you can rely upon on your database**  
 and add contact details



TEAM

**Be sure team is aligned and enthusiastic**



TEAM

**Assign roles and responsibilities**  
 ---  
 identify 2-5 people to drive the Plan



TEAM

**Schedule team stand-ups**  
 ---  
 where to update on the campaign tasks and results



TEAM

**Mark people of influence on your database**  
 and add contact details



TEAM

**Codesign the campaign with the team**  
 ---  
 you can use Success Toolbox



TEAM

**Plan the launch date and duration of the campaign**




TEAM

**Be prepared to pitch your plan to other external organisations**




TEAM


**Brainstorm on at least 10 potential friendly organisations that can help with the campaign**




TEAM



TEAM



TEAM



TEAM

# Photo&Video - Golden Rules

**Take a team picture**



PHOTO&VIDEO

**Make few representative image proposals**  
---  
and test them with friends



PHOTO&VIDEO

**Create/ Update social media profiles**  
---  
only the one(s) needed



PHOTO&VIDEO

**Create a video trailer**



PHOTO&VIDEO

**Create a series of animated gifs**  
---  
to be used during the campaign



PHOTO&VIDEO

**Take 5 picture representing the output of the campaign**  
---  
product, service or event



PHOTO&VIDEO

**Design a logo**



PHOTO&VIDEO

**Create a storyboard for the video**  
---  
and test them with friends



PHOTO&VIDEO

**Make a second iteration on video storyboard**  
---  
based on the feedback of friends



PHOTO&VIDEO

**Plan the video production**




PHOTO&VIDEO


**Design a thank- you graphic**  
---  
with the possibility to add the name of the backer




PHOTO&VIDEO




PHOTO&VIDEO



PHOTO&VIDEO



PHOTO&VIDEO



PHOTO&VIDEO

# Copywriting - Golden Rules

**Write few titles and subtitles options**

---  
and test them with friends

COPYWRITING



**Develop a clear and succinct message**

---  
a few bullet points

COPYWRITING



**Write down at least 10 motivations to back the campaign**

COPYWRITING



**Update project website**

---  
with text, graphics and videos

COPYWRITING



**Update organization website**

---  
with text, graphics and videos

COPYWRITING



**Choose a title and subtitle**

---  
and test it a second time with friends of friends

COPYWRITING



**Write the final version of title and subtitle**

---  
based on the feedback collected

COPYWRITING



**Write a description of the project**

---  
the who, when, where, how

COPYWRITING



**Write stories explaining the reason why the project is so important**

COPYWRITING



**Prepare a pitch of the project to use in public presentation and with other organizations**

COPYWRITING



**Prepare different email contents**

---  
one per each contact group and different phases

COPYWRITING



**Write the final description of rewards**

---  
based on the feedback collected

COPYWRITING



**Design graphics describing rewards and pledges**

COPYWRITING



COPYWRITING



COPYWRITING



# Budget - Golden Rules

Calculate the budget needed to develop the project

BUDGET



Calculate rewards costs

BUDGET



Cut unnecessary costs

BUDGET



Find out the average crowdfunding donation in your country(s) and/or your theme

BUDGET



Multiply the average donation for the number of people on your contact list and divide it by 1/3

---

this is the estimated goal you can reach

BUDGET



Calculate partnership costs

BUDGET



Calculate team work cost

BUDGET



Calculate crowdfunding and financial platform fee

BUDGET



Calculate reward shipping costs

BUDGET



Write a business plan

---

to understand how much you can invest in the campaign

BUDGET



Calculate communication costs

BUDGET



Design a business model

---

to check rewards are convenient for backers

BUDGET



Calculate eventual taxation costs

BUDGET



Update what collected offline on the crowdfunding platform

BUDGET



BUDGET



# Rewards - Golden Rules

**Define between 10 and 15 rewards (what, name, pledge)**

---  
and test them with friends



REWARDS

**Make a second iteration on rewards design (what, name, pledge)**

---  
and test them with friends of friends



REWARDS

**Make a last iteration on max 8 rewards (what, name, pledge)**

---  
based on the feedback collected



REWARDS

**Adjust rewards pledges based on the budget goal**



REWARDS

**Design 1 or 2 special rewards to be added during the campaign**

---  
in case something is not going as expected



REWARDS

**Create an early bird reward (lower price for a certain number/time)**

---  
based on one of those designed



REWARDS

**Design some rewards with partners**



REWARDS

**Agree with partners on the rewards to which they contribute**



REWARDS

**Calculate the environmental impact of the rewards**

---  
and consider how to lower or zero them



REWARDS

**Set the pledge of the best reward around the average crowdfunding donation**



REWARDS

REWARDS

REWARDS

REWARDS

REWARDS

REWARDS



# Communication - Golden Rules

**Mark those supporters you can rely upon on the database**  
and add contact details



**List public events where to speak about the campaign**



**Publish a first story showing the team and talking about the project and why you need to fund it**



**Contact magazines that address the subject of the campaign topic**



**Mark people of influence on your database**  
and add contact details



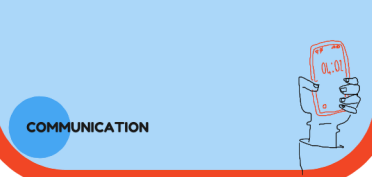
**Create a calendar of publications and emailing for the campaign**



**Add key journalists to contact on the database**  
and add contact details



**All the contacts in the database have been contacted once**



**All the contacts in the database have been contacted twice**



**Add key influencers to contact on the database**  
and add contact details



**Post a first post introducing the project**



**Schedule the social media campaign**



**Sponsor an advertising campaign on social media**



**Send partners tools they can use to promote the campaign**



COMMUNICATION

# Community Gardening - Golden Rules

**Be the first - as a team - to make a symbolic donation**

COMMUNITY GARDENING

**Ask our families for a donation**

COMMUNITY GARDENING

**Ask first circle to help with publicising the project**

COMMUNITY GARDENING

**At least          persons have been contacted about the campaign today**

COMMUNITY GARDENING

**Schedule and send emails to the entire community**

COMMUNITY GARDENING

**Involve the community in the design of the campaign**

COMMUNITY GARDENING

**Plan a launch party with the first circle**

COMMUNITY GARDENING

**Create a WhatsApp Group**

COMMUNITY GARDENING

COMMUNITY GARDENING

COMMUNITY GARDENING

COMMUNITY GARDENING

COMMUNITY GARDENING

COMMUNITY GARDENING

COMMUNITY GARDENING

COMMUNITY GARDENING

# - Golden Rules - what do you think is missing?

