

# **Kick-Off Planning Timeline**

#### **Confirm CEO Attendance**

Before choosing an event date, work with the CEO's team to ensure their availability to host the kick-off event(s). Great leadership inspires others!

Provide support in scripting their speaking notes or prepare a slide presentation as needed.

#### **Send Invitation**

Send out email and calendar invitations to staff, including the virtual event link.

#### Collect RSVPs

By tracking RSVPs you will get a better sense of how colleagues are responding to your invitation.

2 Weeks

**Before** 

#### All Systems Go

Test your conferencing platform, presentation slides, and support materials. This will put your mind at ease, and may help to identify issues you can rectify before event day.

## **Test Your Pledge Tool**

Ensure your pledge tool is ready to accept donations.

Day

**Before** 

## Say Thank You!

**Event** 

Day

Send a communication to thank staff for joining your kick-off event, and encourage them to make a donation using the online pledge tool.

Thank key contributors to your kick-off including speakers and anyone who helped you plan.

# 3-5 Weeks Before

1 Week Before

Before

Follow-up

Create an Invitation

**FIRST** 

Request graphics for event invitations and presentations from your United Way representative.

#### **Confirm Invitation List**

Compile your invitation list. Work with your HR department to ensure you have captured addresses for all staff. If you are hosting multiple kick-off events, consider segmenting your list by department.

## **Request Speakers and Engagement Activities**

Request a United Way impact speaker and virtual engagement activities to help show the impact of support. Please request these from your United Way representative as early as possible!

## Prep Your Pledge and Web Conference Tools

Start setting up your pledge tool to capture donations on event day. Research and choose which web conference tool you would like to use.

#### Send a Reminder

Gauge response to your initial invitation and send a reminder as needed.

## **Provide Updates**

Provide a kick-off agenda, presentation document, list of speakers, or other key information as they become available. This update can also serve as a reminder to confirmed attendees.

## Confirm Key Speakers

Provide your CEO with key messages, speaking notes, and support materials to ensure a successful kick-off. If applicable, check with your United Way representative to confirm your impact speaker. Be sure to share the link to access your kick-off virtually.

## **Prep Your Pledge Tool**

Will it be ready to go on event day?

#### **Last Minute Test**

Test your conference system and any other technology before going live- just in case.

## Ready, Set, Inspire!

Engage your entire organization, inspire them to participate in this year's Campaign and support their community!

## **Immediately After the Event:**

#### Send the Donation Link

Help your staff support their community by sending out the donation link

If you've hosted multiple events, send the link out after the last kick-off event has concluded.