

VIRTUAL KICKOFF EVENT CHECKLIST

FIRST

- ❑ **Confirm CEO Attendance.** Before picking an event date, work with the CEO's team to book their time and ensure they are available to host the kickoff event(s). Also consider whether your CEO would like support in scripting their speaking remarks or would like to speak to slides.

3-5 WEEKS BEFORE

- ❑ **Draft Invitation.** Gather the details of your event. If you need approval from others, consider starting a week earlier.
- ❑ **Confirm Invite List.** Pull and sort your invitation list. Work with your HR department to ensure you have captured all staff. Divide up the list (e.g. by department) if you are hosting multiple events.
- ❑ **Request Other Key Speakers.** If desired, work with your United Way Representative or Loaned Executive to request a speaker, to speak to the positive impact you're making in the community. Please submit this request as early as possible!
- ❑ **Prep Your Pledge Tool.** If you haven't started already, take steps to get your pledge collection method ready. Ensure your pledge cards are printed and/or your online pledge site is up and running.

2 WEEKS BEFORE

- ❑ **Send Invitation.** Send out e-invitation(s), providing the web conferencing information and any other important details.
- ❑ **Collect RSVPs.** Consider tracking RSVPs to help you determine future communications and reminders.

1 WEEK BEFORE

- ❑ **Send a Reminder.** Consider sending a reminder invitation or nudge, if many colleagues haven't responded to your initial invitation.
- ❑ **Update the Invitation.** If desired, make updates to the calendar invitation to include an agenda, presentation document, list of speakers or other key information. This update can also serve as a reminder to confirmed attendees.
- ❑ **Confirm Key Speakers.** Ensure you have all necessary pieces to enable a successful kickoff presence for your CEO. If applicable, check in with your United Way Representative or Loaned Executive to ensure everything is on track, and see if they have any questions (especially about how to access your virtual kickoff).
- ❑ **Prep Your Pledge Tool.** Check in on progress of your pledge cards or online pledge site. Will it be ready to go on event day?

DAY BEFORE

- ❑ **Practice Run.** Complete a practice run to test your conferencing system, presentation documents, etc. This will help to identify issues you can rectify before event day.
- ❑ **Test Your Pledge Platform.** If applicable, ensure your online pledge site is ready to accept donations.

EVENT DAY

- ❑ **Last Minute Test.** Test your conferencing system and any other technology, just in case.
- ❑ **Inspire!** Your event is virtually 'attended' by many, and will go off without a hitch. Your entire organization will be inspired to support their community and participate in this year's United Way Campaign!
- ❑ **Send the Donation Link.** Immediately after the event, give everyone the means to support their community by sending out the online pledge site link or pledge card reminder. If you've hosted multiple events, send the reminder out after the last kickoff event has concluded.

1-2 DAYS AFTER EVENT

- ❑ **Thank Others.** Send a follow-up communication to thank staff for joining your kickoff event and encourage them to consider making a donation. Thank key contributors to your kickoff (your speakers and anyone who supported your event). They'll be pleased to be recognized!