



THE LOANED EXECUTIVES CLUES TO A SUCCESSFUL CAMPAIGN ACCOUNT

CLUES:

C-OMMUNICATION

CALL AND VISIT CEO AND/OR THE CAMPAIGN COORDINATOR

Purpose: Call/visit- CEO and/or Campaign Coordinator

1. Introduce yourself to CEO and/or Campaign Coordinator
2. Plan, organize, and schedule date of PRESENTATION
3. Will an Agency Speaker (s) be needed?
4. How many employees? Brochures/pledge cards
5. Will there be an Incentive? Use to encourage prompt return of pledge cards. I.e. company will give away free lunch, basket of goodies, United Way goodies, T-shirt, etc.
6. Set date campaign will end and when the pledge cards are to be picked up

Contact the United Way Office- 243-0315

1. Fax the Campaign Account Packet request form to the United Way office. 243-6625. Note any special request.
2. Fax the Agency Speaker Request form when an agency speaker is requested, 243-6625-Ronda Davenport
3. NEVER CANCEL A PRESENTATION. NOTIFY THE UNITED WAY OFFICE ASAP IF YOU ARE NOT AVAILABLE

Contact Loaned Executive Co-Partner on Account

1. Communicate with other Loaned Ex. on the Account by telephone, e-mail or fax.
2. Define their role on the account. Speaking, Distribution of the United Way material to employees. Give date, time, location and name of coordinator. How many presentations for the account?

L-EARN THE ACCOUNT:

1. Existing accounts have a history fact sheet which will be in the Lead Loaned Executive folder.
2. New Accounts- information of initial contact will be in the Lead Loaned Executive folder

“LIVE UNITED...give united.”

U-TILIZE RESOURCES AVAILABLE:

1. CEO information packets are available
2. Campaign Coordinator's Guide Folders are available
3. Video's
4. Brochures, posters, incentives, United Way cans
5. United Way Campaign Director will help with presentation when needed
6. Team Leaders are willing to assist other Loaned Executives
7. Agency Speakers are helpful to promote participation
8. New Hires Program- opportunity for new employees to participate throughout the year

E-DUCATE, EXCITE, ENCOURAGE:

1. Educate the coordinator on their role and your role(Guide folder) (review forms and the information required in packet)
2. Excitement-let the campaign be fun for you and the coordinator (build a relationship)
3. Encourage-the coordinator they are doing a great job and you Are there to help.

S-END THE UNITED WAY ACCOUNT PACKET REQUEST BY FAX

1. Once a date, time has been set, fax the required completed "packet request form" to Adrienne.
2. Note any special packet requirements.
Example, Packets for all branches, locations
Additional Certificates
Additional Video's

PLUS MORE:

Seal the accountWITH A THANK YOU..... And pick up the completed packet. Deliver the completed packet with pledge cards to the United Way office. IF you cannot pick up the packet NOTIFY THE UNITED WAY OFFICE or the co-partner(s) on the account.

- ✓ **Delivery of donor's Recognitions:** once the account has been processed, the United Way staff will contact you to pick up the donor's recognitions. Deliver recognitions to the campaign coordinator.

Donor's Recognitions

Leadership Club (\$500 - \$749). Receive a wall plaque.

Patron Club (\$750 - \$999). Receive a wall plaque.

Bronze Feather Fellowship (\$1000-\$1499). Receive a stackable plaque for the year given.

Silver (\$1500 - \$1999). Receive a stackable plaque for the year given.

Gold (\$2000 and above). Receive a stackable plaque for the year given.