

Plan > Prepare > Launch:

A step-by-step checklist for New Year 2026

Phase 1: Prelaunch planning

Status ▾ **Confirm campaign objectives:**

- Status ▾ Increase awareness
- Status ▾ Generate confirmed gifts
- Status ▾ Deepen supporter engagement

Status ▾ **Identify target audiences:**

- Status ▾ General supporters
- Status ▾ Active supporters
- Status ▾ Lapsed supporters
- Status ▾ Staff
- Status ▾ Volunteers
- Status ▾ Corporate partner employees

Status ▾ **Review and prepare campaign foundations:**

- Status ▾ Create or refresh your campaign landing page using [best-practice example](#).
- Status ▾ Draft campaign timeline and key dates (use Example Campaign Timeline).
- Status ▾ Check credit balance in the GMP and decide on any purchases.

Status ▾ **Secure internal approvals:**

- Status ▾ Share [explainer video](#) link with key decision maker(s)
- Status ▾ Need support? Book a check-in with your Partner Success Manager.

Phase 2: Content preparation

Status ▾ **Prepare organisation-specific content and assets**

- Status ▾ Use the same image across all activities — EDMs and organic social posts.
- Status ▾ Pick one hero image that clearly demonstrates your cause.
- Status ▾ Draft a short charity message (~50 words) explaining where a bequest will go.
- Status ▾ Draft all campaign content in your email platform (*use templates below*).

[General supporters](#)
[Lapsed donors](#)
[Active donors](#)
[Staff](#)
[Corporate partnership](#)
[Social media posts](#)

Status ▾ **Finalise and test:**

- Status ▾ Create tracking links in the GMP for each activity and add to all materials.
- Status ▾ Test all links and email functionality.
- Status ▾ Send all content for review and feedback (Gathered Here).
- Status ▾ Send all content for final approval (internal).

 Phase 3: Purchase Credits

Status ▾ **Check and plan credit use:**

- Status ▾ Review your current credit balance in the GMP.
- Status ▾ Discuss credit options with your Partner Success Manager.

Status ▾ **Purchase credits:**

- Status ▾ Consider buying a **bulk credit bundle** for ongoing visibility and discounts.
- Status ▾ Purchase additional credits via the **GMP** if required.

 Phase 4: Launch & Delivery

Status ▾ **Execute campaign launch:**

- Status ▾ Pre-schedule your campaign emails
- Status ▾ Pre-schedule your social posts
- Status ▾ Share internal EDM with staff

Suggested campaign schedule:

Outreach type	Suggested date	Suggested time	Status
Internal staff EDM	Tuesday January 13	3PM	Status ▾
Email wave 1	Thursday, January 15	3PM	Status ▾

Social post 1	Thursday, January 15	3PM	Status ▾
Email wave 2	Thursday, January 22	3PM	Status ▾
Social post 2	Thursday, January 22	3PM	Status ▾
Email wave 3	Thursday, January 29	3PM	Status ▾

Status ▾ **Final checks before launch:**

Status ▾ Ensure landing page link is working

Status ▾ Confirm landing page link is used in all materials (with tracking if Premium).

Phase 4: Post-campaign wrap-up

Status ▾ **Review campaign performance:**

Status ▾ Download campaign metrics from your email platform (*open rates, clicks, etc.*).

Status ▾ Review credit redemptions and confirmed gifts in the GMP.

Status ▾ Compare results across audience segments (*active vs lapsed supporters*).

Status ▾ Record any key learnings or early insights for future campaigns.