

YOUR KICKOFF GUIDEBOOK



**Everything you need to run
your fundraiser**



You're about to take the first, and perhaps most important step. A strong kickoff meeting with your students is vital if you want to reach your fundraising goal. Why, because it establishes the foundation and creates the momentum that your sale needs to succeed. If you want your meeting to be effective, you'll need to know how to:

1. Prepare to have a great meeting
2. Sell your fundraiser to your students

What follows is our 10-point outline designed for those who want to take their fundraiser to the next level.

1. Share Your Mission

Start by communicating your purpose. Why are you having a fundraiser, and how will it help your group? These are rather basic questions, and you may think that everyone already gets that; however, it has to be reinforced. This is where your students need to know how the money raised will benefit them. And make sure to offer specific examples of how you plan to spend it.

For instance, you may be raising funds to pay for an upcoming competition. The money raised will offset travel, food and hotel expenses, which means less out of pocket cost for families. Communicating your purpose in this way allows for both students and parents to relate to the "why" behind your fundraiser.

2. Have a Goal

Do you have a specific selling goal in mind for your students? Don't just ask your sellers to simply "do their best". This is a very vague solution, and doesn't help or clarify anything for your students. Everyone will interpret your request differently.



Unfortunately, this is a very common approach, and it's not very effective. It's like a teacher handing out a test and then telling her students, "You won't be receiving a grade, but try as hard as you can". This communicates to your students that striving for a goal doesn't really matter. Sure, you'll have a select few students exceed your expectations; however, the majority will probably not take it that seriously.

So, what kind of a commitment level do you want your students to have?

A better approach is to be specific and tell them how much they

need to raise. For example, “We need everyone to raise at least \$250 to meet our travel expense needs”.

This also means that you’re going to have to know how many items each student needs to sell. For a brochure sale, our [goal setting guide](#) can help. Or, if you plan to order product up front to sell, you’ll need to know how much to order. We provide an ordering guide on each product page to assist you.

3. Clarify the Process

Do your students know how to proceed? This is where you’ll want to discuss their sales materials with them. With a brochure sale, each seller will receive a custom participation letter, brochure, order form, and prize program flyer. You’ll want to summarize each of these at your kickoff meeting:

- **Participant Letter:** Highlight the key points. For instance, to whom do you want them to make checks payable to, and when will order forms and money be due?
- **Brochure:** You’ll want to familiarize yourself with the brochure prior to your meeting so you can highlight some of the key products in the brochure. Remember, you need to sell these products to your students in the same way that you want them to sell them to their family and friends.
- **Order Form:** Make sure your students know how to use the order form. Pass them out and have them complete the top part first, including their name at the top. Be sure to stress neatness and make sure they use a ballpoint pen and not a pencil.
- **Prize Brochure:** What do your students win for selling? Make sure everyone understands how many items must be sold for each level. This is a good place to “romance” the prizes and create enthusiasm.

Or, if you've ordered product up front and plan to distribute it at your kickoff, make sure everyone knows when the money is due. For direct sale fundraisers like candy bars or lollipops, be sure to also keep track of product that has been distributed to each student. This way you'll know how much money is still outstanding. For more information, see our [sales tracking sheet](#).

4. Reinforce Sales Accountability

Remember, it's not over 'til it's over. You feel that you've had a great kickoff meeting and your students are off and running, or so you hope. Now what? If you're a little anxious, perhaps that's a good thing. This should motivate you to want to know how well your students are doing. You don't want to be the sponsor who failed to check in with their students only to find out that hardly anyone sold.

There are basically 2 ways to reinforce selling accountability, progress tracking and in-sale incentives.

Track Your Progress

If you want to maintain the momentum that you create at your kickoff you're going to need to stay on top of your students. Daily reminding them to sell is one thing; however, tracking their sales is another.

For smaller groups, we recommend having "check in days" with your students. Inform them at your kickoff that you'll have 3 different dates during the sale in which you'll inspect order forms and money collection envelopes.

Since you want to get off to a strong start, we encourage having your first check in the very next day after the kickoff meeting.

This sends a strong message to your students that you want to see how quickly they can get off the starting line. One example of this involves our cash prize programs. With this incentive plan we provide a \$25 bonus award to the top selling student after the 1st day.

Your 2nd check in day should be about half way through the sale, and of course your 3rd check in is when everything needs to be turned in at the end.

Since you've already established an end goal for your sale, you'll also want to have "check in day goals" as well. For example, let's say you want each student to sell 10 items total over the entire 2 weeks. You may then want your 1st check day in goal to be 3 items, and your second to be 7 items. Therefore, when you inspect orders, they'll know what you expect of them throughout the course of the fundraiser. This is because at your kickoff meeting, not only did you communicate their end goal, but also their check in day goals.

By breaking your sale down this way, you're accomplishing 3 things:

1. You're establishing accountability
2. You're reinforcing your expectations
3. You're breaking the sale down into smaller, more achievable steps

Use In-Sale Incentives

Why not reward your student's progress during your sale instead of waiting until afterwards? In-sale incentives are a great way to make selling fun as you strive to maintain, or even build on your sales momentum.

Rewarding students during the sale also gives you the opportunity to jumpstart students who might not have gotten off the fence yet. When students witness their peers winning prizes, it may spark interest in them to want to have the same experience.

The great thing about these types of rewards is you can also incorporate them into your check in days.

For instance, in our previous example where we suggested having 3 check in days, you can have cash prize drawings. This will further motivate your students to reach their check in day goals. For more information on this, see our [money incentive game](#).

This game works best for smaller groups. For school-wide fundraisers we recommend our [prize drawing incentive game](#).

For a list of extra prizes that can be added to any fundraiser, see our [additional incentive ideas](#). You can also learn more about how to [prepare for a school wide fundraiser kickoff](#).



5. The Importance of Online Selling

In addition to making sales out of a brochure, online selling is another great way to raise money for your group. We've seen schools significantly increase their revenue by promoting their online store as a second revenue source.

Here are the benefits:

- **Larger Market:** Your sellers can promote your sale anywhere.
- **Easy Promotion:** Our online store makes it easy for students to reach out to friends and family.
- **No School Delivery:** Product ordered online is shipped directly to the customer.
- **Prize Credit:** Students receive prize credit for online sales.
- **Bonus Earnings:** Your group makes up to 40% profit.
- **No Deliveries:** Items ordered online ship directly to the buyer.

Many fundraising companies offer an online store where students can register and then invite friends and family to visit your store. They can also log in and check their sales progress. Whenever a customer makes a purchase the sale is automatically credited to the seller and the school makes the profit.

Make sure to regularly remind your students to sell online. The top sellers in almost every fundraiser make sales out of both their brochure as well as online. Many schools raise several thousand dollars online alone, so be sure to promote online selling to both your students and parents.

6. Wrapping Up Your Sale

About 3 days before your sale is over, start reminding your students about their turn-in date. Make sure they're collecting money with their orders. Also remind them about reaching their goal and to keep selling up until the very end.

On turn-in day, collect both order forms and money envelopes. Count the money to verify that it matches what's been reported on the order forms.

7. Sending in Your Order

Keep a copy of each student's order form for your records and mail the top copy to the company for processing. We also give groups the option to fax, or scan and email us their order forms. This is only recommended for smaller groups.

Make sure to deposit the money that's been turned in into your group's bank account. Groups receive an invoice once their order has been processed and the difference is kept by the group as profit.

Also, if your state requires the collection of sales tax, the amount owed should be itemized on your invoice. For tax states, we provide a brochure with slightly higher priced items to help off-set the sales tax so you can keep more profit. For more information on sales tax, see our [Ultimate School Brochure Fundraising Tax Guide](#).

We provide a complete checklist at the end of our [school fundraising guidebook](#) that will help answer any questions. Our guidebook also provides you with plenty of resources that you can use throughout your sale.

8. Preparing for Delivery

2 things are important at this stage:

1. Be prepared
2. Know what to expect

Once your order is ready to ship you should be contacted to schedule your delivery. Once confirmed, the most important thing you can do is let everyone else know the date as well. This usually includes any office staff, custodians, and of course your parents. See [How to Prepare for Your Fundraising Delivery for more information](#).



9. Post Delivery Issues

After students have taken home their orders, you may receive reports of missing or damaged merchandise. There are a couple of ways this might be handled:

- **Complete and submit an item replacement form:** Typically you'll receive a form by email when you receive your delivery notice, or it's included with your physical order. You may be required to submit the completed form within a certain number of business days from the date of your delivery. You would then receive your replacement order to distribute to any students to take home.
- **Parent hotline service:** An information sheet will be included inside each seller's box with a toll-free number for parents to call. Any replacement orders would be shipped directly to the individual seller.

10. Post Fundraiser Analysis

The more successful sponsors are always looking for ways to improve their results. The best time to analyze your

performance is when things are still fresh in your mind right after your fundraiser is over. We wrote 2 blog articles on this so feel free to check them out:

1. [How School Fundraiser Analytics Improves Sales](#)
2. [Effective School Fundraising Evaluation](#)

We hope you enjoyed the information provided on our kickoff guide. If you happen to have any questions, feel free to contact us.

Additional Tips:

- Ask a lot of questions before choosing a fundraising company.
- Try to pick a kickoff date that doesn't have you competing with other nearby school groups.
- Be sure to plan your sales dates so you have enough time to deliver your merchandise before a holiday or school break.
- Make sure your students know that checks need to be written out to your group.
- Consider waiting until the orders and money have been turned in before issuing in-sale rewards.
- Any time you give out a sales award, make sure every other student sees you do it.
- Allow extra time after your end date before submitting your order for processing. This helps ensure that you've collected any late order forms.
- Be sure you have a 2nd copy of each order form for your records prior to submitting them.
- Recruit delivery volunteers to help distribute boxes to students.
- Some sponsors require parents to check and sign for their orders before they leave the school.

For even more tips, see our [School Fundraiser Tips & Suggestions](#) page.

We wish you much school fundraising success!