



CONTACT INFORMATION

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Steps to Successful Fundraising with Betsy Ann Chocolates

You have decided to raise money for your school or organization by hosting a Betsy Ann Fundraiser.

Here is a list of tips to help ensure your success:

STEP 1: Select Your Chairperson(s)

Select a Chairperson or a board of chairpersons to run your fundraiser. This person or team should be reliable and enthusiastic about helping the organization raise funds, and be the primary decision makers.

STEP 2: Set Realistic, Achievable Goals

Fundraisers with specific, realistic goals are always most successful.

STEP 3: Establish Your Fundraising Goal

Set the monetary goal you are looking to achieve with your fundraiser. *Set a realistic goal.* It is good to look at amounts raised with past fundraisers to help establish a baseline goal, *and to surpass previous years!*

STEP 4: Determine Which Betsy Ann Fundraising Option is the Best Fit

Choose from our "Family of Fundraisers" by going to our website and reviewing all options. Go to <https://betsyann.com/fundraising> to view all options.

STEP 5: Decide Timeline and Important Dates for Fundraiser

Setting a timeline is crucial. The most important dates you need to establish are:

- **Brochures or Product Delivery Date:** If choosing a Holiday Chocolate Fundraiser, select date brochures will be needed by (*prior* to your fundraiser kick-off date). If choosing a Chocolate Bar, Pretzel Rod or Chocolate Rosary Fundraiser, determine when you will need the product delivered to be picked-up to start selling.
- **Kick-off Date:** Select date you will start sending out information about the fundraiser to your school/organization.
- **Fundraiser Start Date:** Determine the first date people can start selling chocolates. *We strongly recommend a two-week fundraising timeline, no more.*
- **Fundraiser Finish Date:** Determine the LAST day people can sell chocolates.
- **Order Turn-In Date:** Determine the date ALL orders need to be turned in to chairperson (for Holiday Chocolate Fundraiser only)
- **Master Sheet Turn-In Date:** Determine Date the Master Sheet orders forms will be turned in to Betsy Ann Chocolates to place your order for fulfillment (for Holiday Chocolate Fundraiser only)
- Reminder notice dates (calendar several reminder notice dates to communicate with your school/organization and salespeople)
- Order Pick-Up Date: Determine what date will be reserved for Order Pick-Up; Have plenty of help!

Note the following: It is best to schedule a week between the Order Turn-In date and the date Master Sheets will be submitted to Betsy Ann — *this provides a buffer to catch up with any late orders that roll in.*

STEP 6: Estimate Number of Participants | Order Brochures or Product

Estimate how many participants you anticipate will be selling products. This will determine how many product brochures *or* how much product you need to purchase (depending on the type of fundraiser you choose). Place your order with Betsy Ann for brochures or product based on this estimate *or an exact number*.

STEP 7: Create an Effective Marketing Strategy for Your Fundraiser

Plan your marketing outreach. To do this, you should establish:

- **Methods of communication you plan to use:** Utilized prior to *and* throughout fundraiser, such as: Email, flyers, phone calls, social media, etc.
- **Reminder notices:** Calendar WHEN these will be done throughout fundraiser and HOW each will be done, such as flyers, emails, etc. Determine WHO will do this work.
- **Phone List:** Create a phone list in advance with contact numbers of all fundraiser help and salespeople to communicate regularly throughout.
- **Email Channels:** Determine if you will use email and if so, HOW that will be distributed and WHO will do this work
- **Social Media:** Determine if you can use your school or organization social media pages to make announcements and post reminders about the fundraiser. Determine WHO will do this work, and WHEN.
- **Website:** Determine if you will post information on your school or organization website about the fundraiser. WHO will do this work, and WHEN?
- **Marquee Signage:** Determine if you will utilize the school/organization marquee sign to post info about your fundraiser. WHO will do this work, and WHEN?
- **Posters and flyers:** Put together a team to create these and distribute and/or post them. Decide WHEN these should be done by.
- **Incentivize:** Develop ways inspire and incentivize people to participate in the fundraiser. Develop incentives and/or prizes and decide how you will promote them. The more salespeople you have, the more chocolate you will sell. *Incentives work!*

STEP 8: Kick-Off Your Fundraiser

This element is crucial for a successful fundraising campaign. Here are ways to plan a successful Kick-Off:

- Be sure to account for any holidays or potential conflicts with other important activities.
- Pass out all brochures to salespeople, and provide necessary information such as timeline, dates, etc.
- Use clear, simple communication on flyers and emails to avoid confusion
- Talk-up any incentives or prizes you have planned for salespeople.
- Make sure everyone knows what you expect from them. Provide a “How-To” guide and ideas on what they should be doing. **This is a great opportunity to establish the goal for each salesperson to make TEN CALLS to help make sells happen.**

STEP 9: Selling Phase — What You Should Know

Your “Selling Phase” should be the two weeks following Kick-Off and before your Order Turn-In day. **This is the most critical phase of your fundraiser** and determines how successful your fundraiser will be.

The better your advance preparation has been, the better your chances of a successful fundraiser. If you have been highly organized, motivational, communicated goals effectively, developed a good marketing strategy, and “supercharged” your salespeople, you will be on your way to a profitable fundraiser.

Tips for Success during the “Selling Phase”:

- **Check-in often:** If possible, check-in with salespeople regularly. Nearly all successful fundraisers continually and strategically remind salespeople of their task at hand. Ideas on how to do this:
 1. *Verbally remind them, i.e., have someone (like a teacher or coach) do this.*
 2. *Provide DAILY reminders of the countdown and how many days remain to sell.*
 3. *Ask regularly how many have reached their goals. Encourage them to keep going!*
 4. *Offer assistance and encouragement when needed.*
 5. *Make sure colorful posters and banners are posted around campus or organization.*
 6. *Send out frequent emails, flyers or make phone calls to salespeople and provide reminders of when orders must be turned in.*
 7. *Encourage each person to make TEN CALLS. If they have already accomplished this goal, encourage them to continue further.*
 8. *Send out regular reminder notices via flyers, emails or phone calls; Flyers can be made in advance and passed out on days you’ve scheduled. Emails can also be written in advance and sent on a specific day/time. Reminders should motivate the selling effort by reminding them of goals, incentives/prizes and lend encouragement. Remind them of turn in deadlines!*
- **Email or make phone calls to get the word out:** This can also be done in conjunction with printed reminders, but these are more appropriate for the final push.
- **Word of Mouth:** Tell everyone you can in as many places as possible that you are having a fundraiser and would like their support. *Keep in mind: Be tactful and kind and have regard for the varying circumstances for your salespeople and customers.*

STEP 10: Order Turn-In Day at Organization

This is the day that you will be collecting ALL orders from salespeople. Here is what needs to happen:

- Make sure all salespeople know well in advance when this date is. **Remind them each day for the last week of the Sales Phase.**
- Collect ALL orders on the date you’ve set.
- **Do not allow for extra selling time;** *make sure all orders are turned in; contact anyone who doesn’t turn their orders in.*

STEP 11: Deliver Master Sheets to Betsy Ann

Master Sheets are the order forms you will provide to Betsy Ann. You can either ask each salesperson to create Master Sheets for their own orders, or you can form a committee to handle this process.

Before delivering Master Sheets to Betsy Ann, make sure to:

- Create all Master Sheets. **Review to make sure orders are correct.**
- Collect all orders *prior* to turning Master Sheets in to Betsy Ann. If you accidentally receive some orders later than this date, get them to us as soon as possible. We will do our best to process the orders accordingly.
- Make a tally and copy of each Master Sheet for your records (*recommended, but not required*).

*We provide a brochure and a two-copy Master Sheet to each salesperson for taking orders. Orders are written on the Brochure and totaled, then totals are transferred to the Master Sheets. Master Sheets are turned in to the Chairperson who then forwards **both** copies of Master Sheets to Betsy Ann to have orders filled.*

STEP 12: Prepare for Delivery of Orders to Your Organization

Here is what you need to know and do for this date:

- Get prepared for this day by notifying everyone in advance of the date *and making sure you're staffed*.
- Have a designated space large enough for the shipment cleared and ready to accept orders.
- Our delivery driver will stack boxes in an orderly fashion, how you designate. Have a plan in place!
- Arrange for enough help to assist in the distribution of orders. *It's a busy day!*

NOTE: Each package is marked with the salesperson's name, and the number of packages included on their order. One copy of the Master Sheet is included with each salesperson's order. To make distribution easier, orders can be marked with a code (such as, room no., grade, etc.). Prior to the day of delivery we provide a total of all the items sold including the cost to you and how much profit you have made. We will deliver your candy on the scheduled delivery appointment. You may pay prior to delivery, or have a check ready to present to the delivery driver. We will contact you in advance to let you know the total amount due upon delivery.

STEP 13: Distribute Orders

- Notify customers when their orders will be in and ready for pick-up or delivery
- **Late Payments:** If customers have not paid for orders in advance, make sure they know to have a check ready upon pick-up or delivery for the full amount owed.
- **How to handle orders not picked-up:** Decide in advance how you will handle orders that are not picked up on the day designated for order pick-up.

And Remember ...

The key to success is to plan well in advance. Success relies on so much more than sending out brochures and hoping for the best. Develop a strong strategy that can easily be accomplished by your team.

Happy Fundraising!

—*Betsy Ann Chocolates*



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