



## Onsite Event Guide

### EVENT DAY

**Execute Your Event!** Optimize the logistics of the guest experience.

#### Coordinate volunteers

- Review the GiveSmart User Role Permissions and add volunteers to your campaign with the appropriate limited administrative role of your choice.
- Provide training to your volunteers to ensure they are knowledgeable in using the GiveSmart platform. We make it easy and have a brief volunteer training video you can send to get started!

#### Equip your event team

- Your team will be able to assist donors from check-in to check-out using any internet-enabled device, including their phone! (**Note:** *Devices not equipped with a compatible swiper are subject to manual credit card entry only. Compatible swipers must be purchased through GiveSmart, and are compatible with Apple devices using the GiveSmart App only.*)  
**Remember:** It never hurts to have a spare device and chargers on hand!
  - Swipers are never required for a successful event! Sending a text through the GiveSmart platform prompting guests to enter credit cards directly through their phone is a great contactless option.

#### Set-up donation and/or bids displays to visually engage guests in the action.

- Be sensitive to potential donors feelings when considering whether or not to display bidder/donor names alongside dollar amounts.
- Share your display link with your AV team and test it prior to your event.

#### Assign an Admin to orchestrate your Communication Plan.

- For drafted, unscheduled text messages, ensure an admin is tasked with sending out the message and knows what queues to listen/look for.
- Consider scheduling text messages to automatically send if they will not be tied to specific moments in your program.

# Onsite Event Guide

## CONTINUED

### Efficiently check-in guests

- Confirm or add an accurate mobile number for guests so they can participate in giving throughout the evening and receive text message updates.
- Confirm or add a credit card on file to secure bidding; guests can always change method of payment at checkout if you want to allow other methods.
- Advise guests that they will receive a welcome text with their personal GiveSmart campaign link.
- Organize any bidder paddles being handed out numerically and label with guest name. Keep a paper copy of table assignments as backup and reference for open seats where unexpected guests can be assigned without fuss.
- **For Self-Checkin:** send the Not Checked In template text message to guests a few minutes prior to the scheduled arrival time. Allowing them to verify their contact information and check themselves in as they arrive. NOTE: This message can be sent multiple times as a reminder, and our filtered recipient group will only message those guests who still need to checkin.

### Stage staff in the silent auction area to answer questions and assist guests who are unable to participate on their mobile device.

- Encourage guests who are unable to participate on the mobile device to place an auto-bid through a team member. Bids will automatically be placed on their behalf as they are outbid by other guests, up to the designated max bid, all while they enjoy your event!

### Engage donors of all levels with the opportunity to participate in raffles, games, voting, and instant purchases.

- Consider hiding grab and go items such as branded merchandise or wine on your campaign site and designate a team member to add items to each guest account as they are purchased.
- Communicate final times that a guest may purchase chances to win via text message for increased sales. Close and/or hide items that are no longer available for purchase.

### Stage your team to quickly capture Live Auction winners.

- Spread team members throughout large spaces to aid as spotters.
- Consider: Will you approach winners individually or scribe winning bids from afar to enter on the back end?

# Onsite Event Guide

## CONTINUED

- Approaching winners individually is a great opportunity to thank the donor, confirm the winning bid, and verify that the donor is registered with a CC on file.
- Assign at least 2 team members to scribe bids from afar to provide a cross-reference prior to entry. For small teams, talk to your auctioneer about assisting.
- Take an audio recording of the live auction segment to clarify any questions post-event; the voice memo app on most smartphones is convenient to use for this purpose!

### Stage your team to accurately record donations during your Live Appeal.

- Assign at least 2 team members to scribe paddle numbers called at each level to provide a cross-reference prior to entry.
- Take an audio recording of the paddle raise segment from a location near your emcee or auctioneer to clarify any questions post-event; numbers can be called quickly!
- Consider concluding your Live Appeal with a text to donate so that guests who may wish to give at lower levels not called can participate.

### Close your auction according to the expectations you've set with guests.

- Plan to manually close and reconcile the auction to account for any changes in program/timing. Auto-close is typically used for online fundraisers with no live component.
- Send a warning text up to 30 minutes prior to alert donors of their final opportunity to bid and specify the auction closing time to avoid any confusion.

### Efficiently checkout guests

- Enable Self Checkout in your global settings for guests to easily checkout on their phone with the credit card on file- view Paid receipts from their phone during item pickup.
- If you will be accepting cash or checks, designate a single internal team member to be responsible for collecting these payments.
- If you are making credit card processing fees optional for your guests to cover, be sure to ask each guest that you assist with checkout if they would like to cover that fee on behalf of your organization. While many donors are happy to opt-in when presented the opportunity, they don't enjoy discovering additional fees they did not consent to.
- Donors with a card on file may not realize they need to complete the checkout process and instead assume that their card will be automatically charged at the conclusion of the event. You can quickly settle remaining balances using the Bulk Run Credit Cards feature- simply set a threshold for dollar amounts you wish to process.

*If you need some extra help integrating GiveSmart into your fundraising plan, check out GiveSmart's service offerings at [www.givesmart.com/plans](http://www.givesmart.com/plans).*