

ifundIT Campaign Configuration Checklist

Hosting an ifundIT campaign is a powerful way to jumpstart innovation in your organization, but it can also be a very intimidating process. After all, there's a lot to consider! Fortunately, you have access to the years of time-tested experience the ifundIT team has gained to help you make the most effective decisions over the course of your campaign.

Use this checklist to keep track of every major decision you need to make over the course of your campaign. It also lists out the owner of each work item, so know when you can depend on the ifundIT team for support.

Getting Started		
Work Item	Owner	Status
Define Campaign Owner and team	Campaign Sponsor	
Meet to discuss scope, processes, see demo of ifundIT	Campaign Owner ifundIT PMO ifundIT Platform Team	
Provide demo site, Cookbook and Set-up Guidebook, ifundIT naming guidance (campaign and URL)	ifundIT PMO	
Define campaign specifics: theme, funding mode, participant scope, outcomes, number of projects expected, process for "winners"	Campaign Owner	

Preparation/Support Tasks

Work Item	Owner	Status
Agree on the interaction process between Campaign Owner and PMO/Platform team – method, frequency, issue management, status calls	Campaign Owner ifundIT PMO	
Agree on campaign name	Campaign Owner Community Manager	
Set up ifundIT instances with URL ("live" and "stage") and provide to Campaign Owner	ifundIT Platform Team	
Check if the launch video needs to be redone	Campaign Owner	
Define Investor rules: \$ per investor, # of investors, max \$ per project, demographics, special investors, modelling, switch-on date, investor waiting list, investor expiry, contractors not allowed	Campaign Owner ifundIT PMO	
Decide if Innovators can have more than 1 project	Campaign Owner	
Set minimum/maximum team size, if teams are allowed	Campaign Owner	
Define the project formation process: will submission happen outside of the tool or inside, project requirements, process for additions to submission wizard	Campaign Owner ifundIT PMO ifundIT Platform Team	
Set up Project Review Team: responsibilities, training, vetting cadence	Campaign Owner	
Set up support process for user questions: campaign, tooling, contact process	Campaign Owner	
Review ifundIT tool FAQ and modify if necessary	Campaign Owner	
Define system support needs per ifundIT scope and campaign size	Campaign Owner ifundIT PMO	
Define charging mechanism for ifundIT usage/support	Campaign Owner ifundIT PMO	

ifundIT Tool configuration/set-up

Work Item	Owner	Status
Decide if the campaign will allow volunteers	Campaign Owner	
Define campaign rewards (fund2Goal only)	Campaign Owner	
Agree on Campaign Team names to mention in tool (if any)	Campaign Owner	
Agree on any people to provide special thanks to (if any)	Campaign Owner	
Define project categories	Campaign Owner	
Define campaign organizations	Campaign Owner ifundIT PMO	
Define campaign countries	Campaign Owner ifundIT PMO	
Fund2Goal: Define Campaign Admins for notification when projects are funded	Campaign Owner Campaign Admin ifundIT PMO	
Define closure messaging: communications, banners in tool	Campaign Owner ifundIT PMO	
Define communications strategy for “winners” – messaging, media/channels, frequency	Campaign Owner	
Verify that the tool is set up correctly and functional in stage instance	Campaign Owner	
Set up “live” instance of ifundIT for campaign	Campaign Owner	

Running the Campaign

Work Item	Owner	Status
Issue starting and ongoing communications	Campaign Owner Community Manager	
"Switch on" the live ifundIT instance	Campaign Owner	
Manage the ongoing campaign – vetting, publication, questions, metrics	Campaign Owner	
"Switch off" the live ifundIT instance	Campaign Owner ifundIT Platform Team	
Participate in retrospective at end of campaign	Campaign Owner ifundIT PMO ifundIT Platform Team	