

# CLEAR AND COMPLETE GUIDE TO PEER TO PEER FUNDRAISING SOFTWARE

## LEARNING ABOUT PEER-TO-PEER FUNDRAISING

### 1

#### How do Peer-to-Peer Campaigns Work?

##### What is Peer-to-Peer Fundraising?

Peer-to-peer fundraising is a type of fundraising strategy that mobilizes donors to fundraise on a nonprofit's behalf. Donors set up personalized online donation pages and request money from their friends, families, and others in their social networks to help the organization reach a fundraising goal.

##### Other Names for Peer-to-Peer Fundraising:

P2P Fundraising | Crowdfunding | Social Fundraising  
DIY Fundraising | Personal Fundraising | Team Fundraising

[Learn more about our peer to peer fundraising software >](#)

#### Step 1: Structure Your Campaign

##### WHAT IT LOOKS LIKE FOR THE NONPROFIT

When starting any sort of fundraising campaign, the first step will be setting a clear goal and budget. After all, you and your donors need to know what you're working toward and what resources you're working with to get there.

The process of setting a goal for a peer-to-peer campaign, however, is a little different. Not only will you need to set an overall goal for your organization, but you'll also need to set individual goals for your fundraisers.

Additionally, at this stage you'll need to decide the format and time frame for your campaign.

## WHAT IT LOOKS LIKE FOR THE DONOR

Once your organization has recruited a group of donors to fundraise on your behalf, you'll need to give them some important information to properly prepare them for the campaign.

**Before the fundraising starts, make sure your donors are clear on how peer-to-peer works, what their role is within the campaign, and their individual fundraising goals.**

Since many of your donors have never solicited donations before, you'll also probably want to give them a crash course in asking for donations and how they can leverage the tools you provide to be more successful.

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### Step 2: Build Donation Pages

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## WHAT IT LOOKS LIKE FOR THE NONPROFIT

In order to start raising those funds, your donors-turned-fundraisers will need to be equipped with online donation pages.

The easiest way for your organization to provide these will be by using peer-to-peer fundraising software. Through your software, you can generate individualized donation pages for each fundraiser on your team.

These pages link back up to a main campaign page, so all of the donations that your fundraisers collect will automatically be filtered back into the main campaign.

Alongside building your main campaign page, your organization will need to assist your fundraisers with building and testing their pages. Many software platforms come with tutorials you can use to aid your donors.

## WHAT IT LOOKS LIKE FOR THE DONOR

Before the campaign officially starts, each donor will need to build their own customized donation page. Since many of them have likely never participated in a P2P campaign, your organization should provide some assistance.

**Donors can make their pages unique to them by uploading their own photos, goals, and personal stories about why they're taking part in the campaign and what your cause means to them.**

Of course, they should also test their pages in advance to make sure that they'll be able to successfully collect donations from friends and family.

All donation pages should also include social sharing buttons, so donors can easily spread the word and request donations from their networks over social media.

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## Step 3: Begin Fundraising!

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### WHAT IT LOOKS LIKE FOR THE NONPROFIT

Even though your donors will be doing most of the legwork as far as sharing your campaign goes, make sure to promote this effort to your other supporters leading up to when the campaign starts.

**Peer-to-peer relies almost entirely on word-of-mouth marketing, so the more awareness you bring to your campaign, the more funds you'll be able to raise.**

Let the donors who aren't participating as fundraisers know when the campaign will be going on and how they can support you in this effort.

Once your fundraisers are equipped with the tools they need and the rest of your base is aware of the campaign, it's time to start fundraising!

### WHAT IT LOOKS LIKE FOR THE DONOR

It's now time for your donors to show off their solicitation skills!

**Once the fundraising is open, fundraisers can start sharing their individualized donation pages on social media, over email, and through other channels.**

They can share their page as much or as little as they'd like, but of course, it's always good to encourage as much sharing as possible!

Donors should also be sharing their campaign pages through the channels that will be most successful for them. So, for example, if one of your donors has an expansive social media presence, they should focus their efforts on Facebook, Twitter, and their other social media pages for the best results.

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## Step 4: Begin Fundraising!

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### WHAT IT LOOKS LIKE FOR THE NONPROFIT

With your donors doing a majority of the fundraising for you, it can be tempting for your nonprofit to take a hands-off approach to your peer-to-peer campaign.

**However, to ensure that your fundraisers are as successful as possible, it's important to actively oversee the campaign.**

Make sure to stay connected to your fundraisers and provide them with the support they need. Give frequent updates, highlight fundraisers who have gone above and beyond, and provide extra assistance to anyone who might need help reaching their goals.

## WHAT IT LOOKS LIKE FOR THE DONOR

The span of your peer-to-peer campaign will give your supporters plenty of time to start honing their fundraising skills.

Throughout the campaign, fundraisers should be posting regular donation asks. They should also be engaging their networks with other types of content, too.

Similar to your organization, your fundraisers can post updates, acknowledgements, and stories to illustrate how important the campaign and their peers' contributions are to them, as well as how they're making progress towards their goals.

By posting other types of content, your fundraisers will help their networks feel more connected to the campaign, and thus, will spur more contributions!

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### Step 5: Follow Up

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## WHAT IT LOOKS LIKE FOR THE NONPROFIT

Your campaign is over, but the work isn't quite done yet!

To reap the long-term benefits of your campaign, it's important to follow-up properly. The first step to following up will be thanking anyone who contributed (especially your fundraisers!) within 48 hours of the campaign's end.

Additionally, you should be using your software to track your results. By running reports, you can gain insights into your overall performance and hone your strategies for your next peer-to-peer campaign!

And last but not least: insert any new donor data you've received into your nonprofit CRM. It's never too early to start creating stewardship plans to turn your new donors into longtime donors!

## WHAT IT LOOKS LIKE FOR THE DONOR

The donors who stepped up to fundraise on your behalf should be receiving thank-yous from your nonprofit.

These donors went above and beyond in supporting you (after all, they literally stepped into your shoes to fundraise for you!), so make sure that thank-yous are thoughtful and personalized.

However, your fundraisers will also have some thanking to do themselves! Remind your donors to thank everyone in their network who made a contribution.

Remember: your donors are acting on your behalf in this instance, so it's especially important that they express their full gratitude. Not only is it just common courtesy, but it will also help your organization cement relationships with the new donors you've recruited.

# 2

## Types of Peer-to-Peer Campaigns

### Location



#### Online

Since peer-to-peer campaigns require widespread sharing, they're perfectly suited to an online setting, where sharing is quick and easy!

Many organizations choose to run their P2P efforts solely online, with fundraisers sharing their pages and collecting donations over social media and email. Likewise, the nonprofit can reach out and communicate with fundraisers through digital channels.



#### Event-Based

Many nonprofits choose to pair their online peer-to-peer campaigns with an in-person event.

A majority of the fundraising will still take place online, with fundraisers collecting donations by sharing their donation forms over social media and email. However, once the campaign is done, it will be concluded by a physical event.

P2P campaigns are often paired with active events (like walkathons, cycling events, etc.). Active events can accommodate a large number of participants and have a competitive edge. Plus, many people will be more willing to support their peers when they're completing an athletic task, so active events are perfect for P2P!



#### Time-Based

Time-based peer-to-peer campaigns attempt to meet a fundraising goal within a set amount of time.

Most campaigns last 6-8 weeks, but the timeframe can vary based on your nonprofit's needs.



#### Giving Days

Giving days are simply super condensed versions of time-based peer-to-peer campaigns.

Your organization will still have a set time limit to work with, but when hosting a giving day, you'll only have 24 hours to meet your goal!



#### Rolling

If your organization chooses to host a rolling peer-to-peer campaign, you'll have no set time limit by which to reach your goal.

Instead, peer-to-peer will be an ongoing campaign, simultaneous with your other fundraising efforts. Donors can volunteer to set up a page and start fundraising at any time, so make sure you're prepared to regularly oversee this effort.

# 3

## Benefits of Peer-to-Peer Fundraising

### For the Nonprofit

#### Build Trust

With peer-to-peer, your current donors are the ones reaching out and requesting donations, solving the trust problem that nonprofits commonly face when convincing new donors to give.

Since new donors are hearing about how worthy your cause is from those they know and trust, P2P campaigns are an organic way to expand your reach and recruit a lot of new donors.

#### Strengthen Existing Relationships

Peer-to-peer campaigns are some of the most active engagement opportunities out there, giving your organization ample opportunity to reach out and communicate with your donors.

In other words, peer-to-peer is the perfect opportunity for you to strengthen your relationships with existing donors, which should help your retention rates.

#### Cut Costs

Peer-to-peer campaigns are some of the most cost-effective fundraising strategies out there. This is especially true if you're hosting your campaign entirely online.

Since your donors will be doing most of the asking for you, your organization won't have to expend a ton of resources to raise a lot of funds!

### For the Donor

#### Become More Personally Invested

Since your donors will essentially be working for your nonprofit on a temporary basis during your P2P campaign, your donors can frame your work and cause in the way that's most meaningful to them.

This opportunity will result in donors feeling more personally invested in your organization, which leads to longer lasting relationships.

#### Build Relationships

Peer-to-peer campaigns also give your donors the opportunity to reach out to their networks and connect with them in new ways.

Your fundraisers will be able to bond with their friends, family members, and other peers over a shared cause and philanthropic work. And nothing is better at bringing people together than a noble cause!

#### Choose Level of Involvement

Peer-to-peer campaigns are highly flexible in nature, giving your donors more agency over how they engage with your organization.

Fundraisers can share your post just once, everyday, or somewhere in between. In any case, the ability to choose their own involvement based on what's convenient and intuitive to them can empower more donors to participate in your campaign.

#### Get a Free Demo of Salsa's P2P Fundraising Tools

Discover how Salsa's peer to peer fundraising tools will help you unleash your grassroots supporters to raise money via their personal or team fundraiser pages or P2P mobile app.

GET A FREE SALSA DEMO >

# 4

## Peer-to-Peer Campaign Considerations

### Do we have donors who are willing to fundraise on our behalf?

Of course, in order for a peer-to-peer campaign to work, you'll need donors who are willing to fundraise!

Before committing to this effort, be sure to gauge your donor base to make sure your organization has plenty of donors who'd be interested in participating.

The exact number of fundraisers you need will depend on the scope of your campaign, but you should have enough fundraisers to reasonably meet your goals. Remember to consider the fact that not all fundraisers will be equally as involved.

Additionally, you should be sure that your base is cut out for peer-to-peer. Since these campaigns mainly take place online and require a large social presence, your fundraisers should be comfortable using digital communication channels and should have large networks to draw from.

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### Do we have donors who are willing to fundraise on our behalf?

Just because your donors will be doing most of the fundraising during your peer-to-peer campaign doesn't mean that your organization can simply sit back and watch the funds roll in!

Your donors likely have never solicited donations or used fundraising software before, so it's important that your organization has at least one person dedicated to overseeing the campaign and supporting your fundraisers.

Whoever heads the campaign will be in charge of:

- Planning the logistics.
- Setting up your peer-to-peer software and building donation pages.
- Promoting the effort through all channels.
- Posting updates and otherwise communicating with fundraisers and donors throughout the campaign.
- Fielding any questions or technical difficulties.

P2P will still take a significant commitment of staff time and resources, so make sure that you can reasonably take on another fundraising effort.

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### Will our campaign be paired with an event?

Before hosting a peer-to-peer campaign, it's important to decide which format your campaign will take, especially as far as location is concerned.

**A peer-to-peer fundraiser that's tied to an event will require a significantly greater investment of time and money on your organization's behalf than would one that's taking place solely online.**

You'll more than likely need some additional tools and resources (such as event-planning software, a venue, a caterer, etc.) and to start planning farther in advance.

No matter what you choose, it's important to determine the format of your peer-to-peer fundraiser in advance, so you can be sure that you'll have everything you need to run the most successful campaign.



## Do we have the right software?

As a primarily digital effort, peer-to-peer fundraising is made much easier with the help of the right software.

Peer-to-peer fundraising software can simplify and improve your campaign in a number of ways. However, not all software is created equal; each platform will have a unique set of features and functionalities.

Before starting your campaign, your organization should be sure that you're not only working with robust software, but that you're working with software that's right for you.

To learn more about peer-to-peer fundraising software and the buying process, jump down to this section in our guide!

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# 5

## Peer-to-Peer Fundraising Best Practices

### Best Practice #1: Create a Toolkit

With many different people spreading your message across their networks, it's all-too-easy for your work, cause, goals, and other information about your organization to get lost in translation during your peer-to-peer campaign.

**Provide your fundraisers with a toolkit that includes materials they can draw from throughout the campaign.**

Your toolkit will ensure that, while everyone shares your message in a way that's unique to them, your fundraisers will still be presenting a unified front. No donors will be confused about the meaning of your campaign and what you're requesting!

#### What to include in a P2P Toolkit:

- Basic information about your mission and cause
- An overview of campaign goals and strategies
- A suggested posting calendar
- Branded photos and videos
- Pre-written copy for social media posts

### Best Practice #2: Take an Active Approach

Throughout your peer-to-peer campaign, you should be engaging donors and fundraisers alike with frequent updates and posts. Similarly, your fundraisers should regularly be sharing their progress toward their individual goals with their networks.

**Providing your network with frequent updates will allow donors to see that the campaign is making steady progress, which assures donors who have already given that their funds are being put to good use and encourages new donors to join in to help you meet your goal!**

#### How to keep supporters engaged during a P2P campaign:

- Post progress updates toward your goals
- Highlight fundraisers who have gone above and beyond
- Assist donors who need help reaching their goals
- Share other news and content related to your campaign
- Show the results of contributions



## Best Practice #3: Promote Your Campaign Through All Channels

Your peer-to-peer campaign is going to require widespread visibility to be successful.

While your donors will take care of much of the campaign promotion for you, your organization can still give your campaign a boost by promoting your P2P efforts to your base.

You should take a multichannel marketing approach that includes not only online channels but offline channels, too. After all, the more channels you promote your campaign through, the more people who will see it!

## Best Practice #4: Tell a Compelling Story

Considering that something as emotionally charged as nonprofit work is involved, convincing new donors to give often takes an emotional appeal. There's no better way to get at donors' emotions than by telling a heartfelt story!

This best practice can certainly apply to your nonprofit, but in this case, it mainly applies to your fundraisers. **Sharing stories about how the cause has personally impacted their lives can make your nonprofit's work and mission more vivid and impactful to new donors.**

When new donors are moved by your cause, they're sure to start supporting you!

## Best Practice #5: Properly Recognize Participants

Make sure your fundraisers and donors know just how important and appreciated their contributions are by expressing your gratitude shortly after your peer-to-peer campaign has ended.

You should not only be thanking the donors who participated as fundraisers but also any donor who made a gift. **However, keep in mind: your fundraisers have made a big commitment to supporting you, so they probably deserve a different kind of thanks than those who gave money to the campaign.**

Don't forget to remind your fundraisers to thank their networks, too. After all, your fundraisers are the ones who know the donors who gave personally, so a thank-you that comes from them will have special meaning.

### Where to promote your Peer-to-Peer campaign:

- Social media
- Your nonprofit's website
- E-mail newsletters
- Direct mail
- Events

### How to tell a compelling story:

- Write in first person
- Keep it short
- Use concrete details
- Be relatable
- Make sure there's a personal connection

### How to recognize participants:

- Social media shout-outs
- Thank-you letters
- Personal phone calls
- Gifts (for example, a package of branded merchandise)
- Appreciation events

## Best Practice #6: Create Stewardship Plans for New Donors

Seeing as peer-to-peer fundraising can bring lots of new donors into your organization in a short amount of time, your organization will likely be flooded with a wealth of new donor data.

Your organization should create a well thought out plan for managing data collection and stewarding new donors before your campaign starts, or else it can be difficult to keep track of all of the valuable data coming in and how you're going to leverage it.

Data collection will be much easier if you integrate your peer-to-peer fundraising software with your nonprofit CRM. That way, all of the new donor data collected during your P2P effort will automatically be recorded in your donor database and will be stored centrally.

### Questions to ask when creating a stewardship plan:

- How will we manage the new donor data that comes in?
- How can we leverage this data?
- How will we follow up with new donors?
- Which communication channels will we use for targeting new donors?
- What types of engagement opportunities can we offer new donors?

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# CONSIDERING PEER-TO-PEER FUNDRAISING SOFTWARE

## 1

### Defining Peer-to-Peer Fundraising Software



#### What is Peer-to-Peer Fundraising Software?

Peer-to-peer fundraising software is a type of software solution that was built to help nonprofits facilitate their peer-to-peer campaigns. This type of software includes features such as individualized donation pages, social sharing buttons, event management, and more that enable nonprofits to provide their fundraisers with the tools they need to collect donations during a P2P campaign.



#### Why do Nonprofits Use Peer-to-Peer Software?

Peer-to-peer software provides nonprofits with a centralized platform for overseeing their peer-to-peer campaigns so they can manage them more effectively. Additionally, using peer-to-peer software enables organizations to provide their fundraisers with the tools they need to make their peer-to-peer campaigns more successful. Overall, this software can greatly simplify and improve the process of P2P fundraising.

# 2

## Features of Peer-to-Peer Fundraising Software



### Events & Fundraising Management

Hosting an event as part of your peer-to-peer campaign? P2P fundraising software provides your organization with a centralized place for planning your event and managing your online fundraising

That means that all aspects of your campaign can inform each other to give you the most comprehensive view.



### Individualized Donation Pages

Easily create individualized donation pages that each of your fundraisers can share with their networks to collect donations.

Peer-to-peer fundraising software even allows donors to customize their pages with personal goals, stories, photos, and videos to make your cause more meaningful and compelling.



### Thermometers

Fundraising thermometers update in real-time as supporters submit their gifts. Include thermometers on your campaign and individual donation pages and in social media posts giving campaign updates.

When supporters see how close you are to meeting your goals, they won't be able to resist making a donation!



### Reporting and Analytics

Run a variety of robust reports to track the performance of your P2P campaign.

The reporting and analytics features included in peer-to-peer fundraising software will give you the insights you need to keep honing this campaign and those in the future.



### Social Sharing Features

Place social sharing buttons on your individualized donation pages, so fundraisers can quickly share your campaign over social media.

Since sharing over Facebook, Twitter, and other social media sites is always a breeze, you'll be able to expand your reach far and wide!



### Team Fundraising Pages

Stay on top of tracking all of the valuable donor data you collect without a second thought.

With simple CRM integration, all new donor data you receive through your P2P fundraising software will be recorded in your donor profiles for easy consultation.

# 3

## The Benefits of Using Peer-to-Peer Software

### Better Oversee Your Campaign

Peer-to-peer software provides nonprofits with a centralized place for both managing their online fundraising (processing donations, collecting donor data, etc.) and planning peer-to-peer events.

Because you can see how every aspect is working in conjunction, your organization will be better able to oversee your campaign and adjust your strategies throughout.

### Seamlessly Collect Data

Peer-to-peer fundraising software will make the process of collecting and managing donor data more seamless for your organization.

Since all of your donation pages are generated from the same platform, all of the data that fundraisers collect will automatically be filtered into your software. Furthermore, you should be able to integrate your P2P software with your CRM to automate creating new donor profiles.

Centralized data will be easier to consult, and you'll get a more complete view of new donors to help you better steward them.

### Clearly Display Results

Peer-to-peer software comes with built-in fundraising thermometers that you can use to more clearly demonstrate the progress of your campaign to donors.

Fundraising thermometers update in real-time as donors make gifts, providing supporters with the most current updates on the progress you're making towards your goals.

When donors can clearly visualize that you're making steady progress and see how close you are to reaching your goals, they'll be more inclined to donate.

### Expand Your Reach Farther

Peer-to-peer software enables you to place social sharing buttons right on your online donation pages, so it's always easy for fundraisers (and their peers!) to share information about the campaign and their donations.

When supporters can share your campaign with simply the click of a button, you're sure to expand your reach farther. That means more donations to your campaign and more new donors for your organization!

### Customize Your Content

Peer-to-peer fundraising software will make the Peer-to-peer software will allow your organization more flexibility when it comes to creating customized content.

With your software, you and your fundraisers can customize your pages with photos, stories, goals, and more. Your organization can reflect its unique work and mission, and fundraisers can illustrate why your cause is personally meaningful to them.

Customized pages stand out from the crowd and help you connect donors more closely to your campaign, so you'll see higher visibility and more donations!

### Gain Powerful Performance Insights

Peer-to-peer software includes powerful reporting and analytics features that can give organizations more granular insights into how well their peer-to-peer campaign are performing.

You can run a variety of P2P-specific reports to ensure that your campaign is on track and to adjust any strategies that might not be working.

Using software is really the only way to effectively evaluate your campaign so that you can keep improving it to raise even more.

# 4

## Considerations to Make When Choosing a P2P Software Vendor



### Features

When shopping for peer-to-peer software, ensure that your platform is feature-rich and provides you with the capabilities you need. If your campaign includes an event, make sure you're purchasing a platform that includes event planning features, too.



### Intuitiveness

In order to be able to utilize your software as effectively as possible, the interface should be relatively intuitive and easy-to-use.



### Set Up

Some P2P platforms make the setup and data transfer processes easier than others. Ask your vendor about setup and data transfer to make sure you can get up and running with minimal hassle.



### IT Support

If you ever encounter any technical issues with your software, it's important that you're working with a vendor who's easy to get in touch with and can address problems with little turnaround time.



### Number of Fundraisers

Many fundraising software platforms are partially priced by how many constituents they can support. You should be buying P2P software that can accommodate all of the donors who will be fundraising so you can equip each of them with a donation page.



### Scalability

You should be looking for a peer-to-peer platform that's scalable so it can grow with your P2P efforts.



### Training

Some peer-to-peer software vendors provide more support with training than others, so double-check that you're working with a vendor who can provide you with the level of training you need.



### Integrations

You'll be collecting tons of new donor data with your P2P software. Check that the platform you choose can be easily integrated with your CRM to make data collection as seamless as possible.

[Learn more about our peer to peer fundraising software >](#)