CLIENT ON-BOARDING PACKET

Getting Ready for YOUR Success with LGM Consulting

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WELCOME

Welcome aboard! We look forward to working with you and helping you succeed.

Your Account Manager will be communicating with you directly to schedule an on-boarding call.

In the interim, our Operations Director, Michelle Lynch as well as our Traffic Operations Manager, Kristen Batdorf, will work with you to ensure everything occurs in an efficient manner as we on board your account with our proven quality control methods.

Please review this entire document and work with them to get your donation platform access configured as well as provide us the materials requested throughout this packet.

The faster you can work with us to on-board your account, the faster we can produce the results you are seeking. On the next page, you'll see a summary of steps needed to move the process forward successfully.

The LGM team is available to answer questions, and you're welcome to contact me directly with any concerns.

Your success is our top priority. Thank you again for the opportunity to serve you.

Sincerely yours,

Bryan G. Rudnick

Bryan G. Rudnick
Managing Member

NEXT STEPS

Here is a summary of the steps needed to ensure we start on the right foot.

1) Agreement is signed.
2) Client reviews this On-boarding packet.
3) Client Provide materials detailed in the packet.
4) Arrange an on-boarding call to discuss:
    a. Messaging (Calls-to-action)
    b. Dos and don'ts
    c. the materials provided by the client.
    d. Your programs services
    e. Any disclaimers that need to be used in your marketing materials

5) Client integrates LGM personnel with their donation platform and ensures all necessary features are operable.
6) LGM starts working on creative.
7) Client reviews creative and edits are made until the client provides final approval.*
8) Template landing page is configured and requires client approval.*
9) Once all of the above is completed, we can endeavor to launch the marketing campaigns within 10 days or less.

*Please note that all approvals must be in writing and provided by the Client Liaison listed in the Agency Agreement.

ITEMS NEEDED

1. **For Dropbox—**You will receive an invitation to a shared Dropbox folder. If you need others on your team invited as well, please let us know and ensure to upload the following items.

    a. Campaign/Organization logo in the following formats .jpeg, .png or .gif,
    b. Signature of any letter signers in the following formats .jpeg, .png or .gif,
    c. Pictures of your leadership and letter signers
        i. Headshots
        ii. Group shots
        iii. Especially with political celebrities, Members of Congress, Trump family, media personalities, or other celebrities that could help enhance response to our creatives
    d. Prior email or direct mail fundraising letters (if applicable),
    e. Any other information you believe would be helpful in your fundraising including opposition research, talking points, polling information, etc.
    f. If your leadership or any signer of the letters has served in law enforcement or the military, please provide pictures of them in uniform will be helpful.
    g. Please provide a disclaimer to be placed in the footer of your emails as required by the FEC, or your state campaign finance department. For non-profit organizations, it is always a good practice to have one that explains your tax status and mission.
    h. A copy of your email house file if we are managing it for you.

2. **Donation Platform Access**
    a. If using Anedot:
        i. Michelle Lynch mlynch@asgroupinc.com and kristen@asgroupinc.com should be provided admin level access to your donation platform. They will invite the other members of our team that will also need access.
        ii. Once the aforementioned is completed, Michelle and Kristen will configure donation pages for our efforts and reach out to Anedot to confirm the billing markup has been added before we commence our marketing campaigns.
    b. If using Revv or WinRed:
        i. Email kristen@asgroupinc.com and mlynch@asgroupinc.com to get our agency ID to add to your account
        ii. Once the aforementioned is completed, Michelle and Kristen will configure donation pages.

If you have any additional questions, please let us know.

SOURCES, CITATIONS & SURROGATE SIGNER INSTRUCTIONS

SOURCES & CITATIONS

It is essential that all information in your marketing efforts, especially statements used to support facts are accurate. We will provide you with our sources when you receive creative to review, and we are always willing to provide more sources to make you comfortable about statements being made in the letters.

If you have statements you want included, we also ask that you provide us with the appropriate citations and sources for our records.

SURROGATE SIGNERS

Many of our clients have successfully utilized Sean Hannity, James Golden aka Bo Snerdley, Newt Gingrich, President Trump, members of the Trump Family, Jon Voight, members of the Duck Dynasty family, Ted Nugent and heads of faith-based ministries.

Surrogate signers will generally increase the response to our marketing messages.

We encourage you to use surrogate signers if you have access to individuals who can serve in this capacity, but please do not ask us to write letters on behalf of surrogates until you have properly coordinated with your surrogate.

Unless other arrangements are made, we do not get involved in requesting surrogate signers to participate in a volunteer or fee-based arrangement. Clients make the request to the surrogate signer directly, but if you desire, we can send the surrogate a copy of the letter once the request is made and facilitate edits as needed.

The final approval must always be provided in writing by our Client Liaison* via email or through our Review and Approve system. The client is always responsible for coordinating a final approval from the surrogate unless other arrangements have been made.

*The Client Liaison is the individual listed in the Agency Agreement as "Liaison".

HOUSE FILE MANAGEMENT

House file messaging is a productive and essential element for our digital marketing efforts and we will look for opportunities to help you maximize results from your house file.

If you have retained us to manage your house file from prior marketing efforts, (email lists, petitions, Facebook, etc), please upload the files in CSV or Excel format to the Dropbox folder we have shared with you. We will segregate those segments from the names we provide you though our marketing efforts.

House file letters will often be used to test messages before we send them to prospect lists to ensure best results and test the messaging.

When you upload your files, please label them and if practical, please include a word document that details the files and their origins.

For Best Practices, please include as many fields of information as possible, especially the date, time and IP address from where they opted-in or donated to you. If you can include the “first name” of the individual, it is helpful towards the marketing efforts.

There is no need to provide a list of “unsubscribes” and we will not use such files, however, we may be able to help you re-activate members who have stopped opening or engaging with your email letters.

DELIVERY REPORTS AND TEST EMAILS

In our performance-based program, we do not provide reporting on size of deployments, open rates, click through rates or other metrics. Generally, we evaluate performance on conversions and donations.

It is our standard practice to test marketing campaigns with 100,000 to 200,000 emails and then evaluate our expansion for an individual marketing campaign to more emails, segments and additional lists.

Your Account Manager can gather these metrics for a review of the overall efforts, but we do not always receive these metrics from list owners and therefore it may be an incomplete summary.

DONATION PLATFORM RECEIPTS

Anedot, Revv and WinRed allow you to customize the thank you emails and receipts to donors. Instructions on setting up and customizing receipts and thank you emails are outlined below:

1. Anedot – https://help.anedot.com/knowledge/edit-campaign-receipt
2. Revv – https://support.revv.co/en/articles/1511266-adding-substitution-variables-to-email-receipts
3. WinRed – https://support.winred.com/en/articles/3543717-customize-emails-to-donors

WARMING UP NEW DONORS

It is essential that you have a strategy for warming-up your relationship with your donors.

Make sure to communicate with them regularly and not solely focused on soliciting additional contributions.

It begins with a thank you note, and should continue regularly with updates on:

- Endorsements,
- Milestones reached,
- Surveying them on key issues,
- Great media stories about your activities, and
- Anything else that may demonstrate to a donor that you are making good use of their support.

Please consider adding pictures and videos to these communications. All of these efforts should lead to regular and larger donations from these donors.

If you would like assistance drafting these strategies and messages, please let us know.