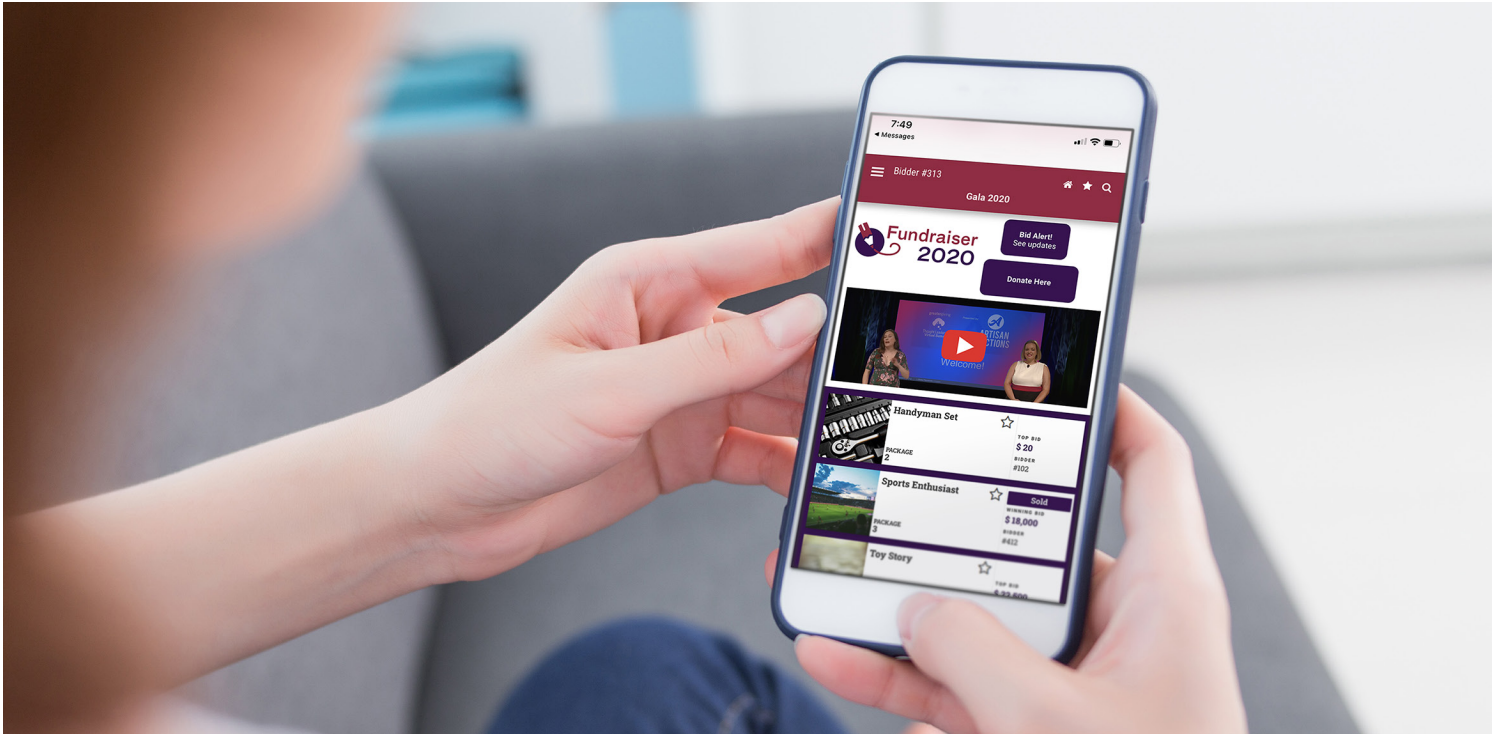


Online Bidding & Virtual Event Success Guide

Your guide to holding a successful Online Bidding event!



What This Guide Is

Thank you for your interest in implementing Online Bidding. We know that running a mobile-enabled online auction/virtual event is a big undertaking. With that in mind, we've created this Online Bidding & Virtual Event Success Guide, filled with best practices, checklists, and timelines, which you can refer to and make use of before your event. In working with our clients, we have found tools like these to be very effective in helping everyone stay organized.

This guide is intended to be a comprehensive resource for you and your team if you are using Online Bidding in conjunction with a Virtual Event. You should read this guide if you are: the Auction

Chair; the Auction Administrator in charge of setting up the auction in our platform; and/or the person in charge of the technical aspects of your Online Bidding event.

*Please note: the material presented is most helpful for those familiar with Greater Giving Event Software Online and with the process of setting up your event in the software. If you have any questions, reach out to the Greater Giving Client Services team at 866.269.8151 or support@greatergiving.com. **You can also find comprehensive resources in the Greater Giving Online Help section [greatergiving.com/help](https://www.greatergiving.com/help).***

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Online Bidding Terms

Embed Video: One of our latest enhancements to Online Bidding gives you the ability to add either a recorded video or live video to your Online Bidding site. Your guests can stay connected whether they are browsing packages, making a donation, or bidding on a package. We are currently optimized for Youtube and Vimeo streaming. Facebook is available as well. Youtube and Vimeo streaming do not pause while navigating the site. If a video is paused, related videos will appear. These related videos are based on the video host's recommendation and cannot be controlled.

Engagement Center: This area hosts your Project Image, Donate Now button, bid alert button, and your embedded video.

Giving Board Display: Display showing an interactive progress gauge that fills in as bidders use the Online Bidding Donation Button to donate towards your Fund-a-Need or Special Appeal.

Buy Now: An option that allows guests to purchase packages outright at a specified price.

Classes: Package fields designating areas of interest (e.g. Health, Beauty, Travel, Entertainment, etc.). The class groups similar packages together in the Online Bidding menu your viewers will see.

Auction Display Board: Display showing the current high bid on a package, the current winner of a package and how much time is left on packages in your silent auction. There is also an option to display packages with no bids.

Mass Text/Email: The messaging function from the Online Bidding Dashboard to communicate with groups of bidders.

Max Bidding: A feature that allows guests to place the maximum amount they are willing to spend on a package. Once a max bid is placed, the system will bid on behalf of the bidder until the max bid amount has been reached.

Online Bidding Dashboard: Area used to perform admin functions and monitor the auction. Functions include viewing auction statistics, deleting incorrect bids, and texting bidders.

Multiple Sale Packages: Packages that can be sold at a set price to multiple bidders (e.g. sign-up parties).

Personal Registration Link: A link that is specific to a Supporter within your Greater Giving Online project.

Public Auction Link: A link that you can share to allow people to self-register for your Online Bidding auction. This link can be shared through social media, on your organization's website, through an email marketing campaign, etc.

Registration: Gathering information prior to the event day—including name, mobile phone number, email address, and credit card information.

Sections: Package fields designed to show the part of the auction the package is in (e.g. Silent Auction, Live Auction, Sponsorship, etc.) Sections determine which packages will appear on Online Bidding and when those packages will open and close.

Self-Registration Invite: An email that will include a Supporter's personalized link to begin bidding.

Welcome Message: A message sent when a guest self-registers through Online Bidding or is checked in through Go Time. This message can be sent via text and/or email.

Pre-Event Documents

Communication Plan with Bidders

With a virtual event you will need to be sure bidders understand what technology they will need to have in place to view your stream but also participate from the auction. This can be accomplished with any of the following combinations of technology: mobile phone, tablet, laptop, and/or smart television. The biggest piece of ensuring your success with your virtual event is clearly communicating to your bidders how they will be participating and how to register.

Registering as an Online Bidder

Once you've created your project in Greater Giving Online and added in packages to be sold, you can share the public auction link with your bidders. They can click Start Bidding to create a new account or if they've participated in Online Bidding with your organization before, they can login with existing credentials or reset a password. After entering their email address they will be asked to complete their account by clicking a link in the confirmation email and then entering their contact information and credit card details.

Recommended Training Sessions

An important part of the preparations for your upcoming Greater Giving Online Bidding event will be participating in our training webinars. We host them live on a weekly basis and also offer them on demand in case your schedule doesn't allow you to attend a live session. Your training recommendations are listed below.

- If you are new to Greater Giving Online, sign up to attend the **Greater Giving: Getting Started Training** webinar.
- Sign up for the **Greater Giving Online Bidding Training** webinar which covers the setup process for Online Bidding, your Online Bidding Admin Panel, and the bidding interface.
- Links to sign up for the live training, as well as links to on-demand versions of this training, are available at greatergiving.com/help.

Help Resources

- For the most up to date help guides and resources, see our **Online Help Guide** at greatergiving.com/help.

Sponsorship with Online Bidding

Sponsorship is a great way to add revenue to any fundraising event. Online Bidding offers a few unique ways Sponsors can be displayed. Make sure when planning your event to keep these revenue streams in mind.

Sponsorships on the Bidding Screen

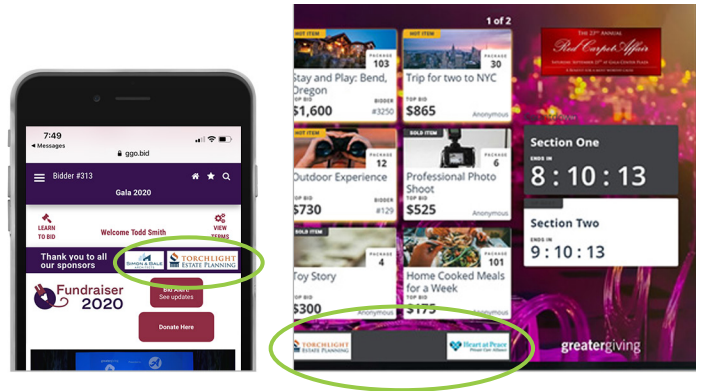
At an Online Bidding event, bidders are constantly checking their devices—making it the ideal area for sponsorship opportunities. Sponsor logos can be strategically placed in line with packages and higher level sponsors appear more frequently, ranked by level. You can also choose the frequency of when the logos appear.

Sponsorships on Display Boards

Online Bidding also offers display board sponsorships, allowing you to showcase your sponsor's logo on the left of the display boards. Strategically utilized during a virtual event, the bidders will see the logos scrolling across the screen whenever you choose to show display boards.

Sponsorships in Text Message

Online Bidding also has the ability to text bidders' updates as the event progresses. Thank your top sponsor by texting out a message to all bidders mid-event. Keep in mind that hyperlinks in texts are active on most phones to include the sponsor's website.



Sponsorship logos displayed in Online Bidding products

Best Practice Recommendations

Equipment

The types of equipment you will need varies depending on your virtual event or stand alone online auction. One benefit of Greater Giving Online Bidding is that bidders can bid from any device and don't need to download an app to participate in the auction. All bidders do need to register as bidders in order to bid on packages and make donations during the virtual event.

Package Recommendations

- Keep package names short and precise. The name should describe the item before a bidder clicks on the package. We recommend no longer than 42 characters for a package name. If you are using the leaderboard display, package names longer than this may not fully appear on the display.
- There is not an actual limit to the number of characters that can be used but it is a best practice to limit the description for a bidder to read as long as all the necessary information is displayed.
- Specify a value for each package. The value is displayed by default on your Online Bidding website so any package that is not listed with a value will appear as having a \$0 market value. For packages that do not have values (e.g. artwork, experiences, etc.), you can list these as "Priceless." If you do not wish to show the value, you can disable showing values for packages in the Display Settings of Online Bidding Settings.

- Bid increments
 - Values less than \$50—\$5 increment
 - Values less than \$100—\$10 increment
 - Values \$100–\$250—\$20 or \$25 increment
 - Values \$250–\$500—\$25–\$50 increment
 - Values \$500–\$1000—\$50 to \$100 increment
 - Values \$1000 and up—\$250 increment and up
- Upload an image for each package. Images will give your packages more of a visual appeal and will be helpful for remote bidders. Images must be smaller than 300kb in size and 1024x768 pixels.
- Assign packages to Sections.
 - Sections tell the package when to open and close the bidding.
 - You can also decide if you would like to preview live auction items online prior to them going live.
 - You can have multiple sections that open and close at different times.

Registration Recommendations

- Promote to bidders that they should register using the URL you've provided and to create their account using the "Start Bidding" button in the top right corner. Your public auction link is the fastest and easiest way to have bidders register for your event.

Text Recommendations

- Compose your texts ahead of time. You may not send them all but having your texts written ahead of time will save you some time during the event.
- For text messages that are time sensitive, be sure to include an exact time since the text messages can take up to 15 minutes for all guests to receive them. For example, if you want to send a text message to let your bidders know that the auction will be closing soon, rather than saying 15 minutes, say 10:00pm.

- Send out 5 or less text messages during the event. Your bidders will already be receiving outbid texts and you don't want to pull them away from the bidding site too often. See below for a few sample text messages.

When to Send Text	Recipient Type	Text Message
1 hour prior to event (if doing pre-bidding)	All Bidders	We're going live at 7 pm! Click here to continue bidding on our great items. [u]
During the event	All Bidders	Huge thanks to our sponsor. (insert sponsor name and webpage URL)
During the event	All Bidders	Don't forget to click on the "No Bid" button for some great deals. [u]
Towards the end of the auction	All Bidders	The silent auction will close at (time). Check your Bids area to make sure you are the leading bidder! [u]
After the auction has closed	Winning Bidders	Congratulations! You're a winner! Check your Bids area to see what packages you have won! [u]
After the auction has closed	Non-winning Bidders	Thank you for joining us! If you haven't already, make a donation by clicking the donation button at [u].

Pre-Event Recommendations

- Communicate with bidders beforehand to make sure they know how bidding will work and to be prepared with a fully charged smartphone/tablet and a way to watch the live stream of your event.
- Have bidders pre-register from the public auction link and have their account ready to go in advance of your live stream.
- In order to help answer bidders' questions as they arise in advance of and during your virtual event, build and "sell" a sponsorship package with a sponsor logo. The logo could be a design of your organization's logo and a contact name, phone number and email address to reach out to with questions. Then this sponsor logo will display on the bidding display and be a quick reminder for bidders of who to contact with questions.
- Customize your post-event receipts to include information about package pickup or delivery and other event specific information.

During the Event Recommendations

- If you are using Max Bidding, make sure you feel comfortable explaining it to your bidders.
- Make sure your bidders and volunteers are aware of the "My List" area. This area is used to easily view bidders' bidding activity.
- Do not change package numbers, sections, values, minimum bids, minimum raises, or guaranteed purchase prices on packages that have bidding history on them.
- Finalize transactions after your event and communicate with winning bidders how the package pickup or delivery process will work.

Post-Event Recommendations

- Ensure all checks, cash and other forms of payments have been entered. Reconcile sales prior to submitting the credit card charges.
- Compare the BID-03: Sales Listing by Supporter report with the Bid-18: Bidders with Credit Cards on File report to confirm the amounts to be charged to each bidder's credit card(s) on file. You'll also be able to pull data from the Online Bidding dashboard and see bid history for all auction packages sold in Online Bidding.
- Send post-event receipts out to all winning bidders and donors.
- Communicate to winning bidders how and when package distribution will take place.

Planning Ahead—Getting Organized

Event Info		Notes
<input type="checkbox"/>	# of Bidders (goal)	
<input type="checkbox"/>	# silent auction packages	
<input type="checkbox"/>	How and when will you sell the silent auction packages?	
<input type="checkbox"/>	# live auction packages	
	How and when will you sell the live auction packages?	
	Will there be other fundraising at the event in addition to the auction?	

Staff/Volunteers		Notes
<input type="checkbox"/>	Do you have one point person who can take responsibility for coordinating, managing, and/or delegating all aspects of the virtual event streaming and technology?	
<input type="checkbox"/>	Do you have one point person who can take responsibility for coordinating, managing, and/or delegating all aspects of the Greater Giving software?	
<input type="checkbox"/>	Appoint a Procurement leader to manage the item donation and packaging process.	
<input type="checkbox"/>	Appoint a Participation leader to manage the process of marketing and sharing the event with supporters and communicating how to register to bid.	

Registration		Notes
<input type="checkbox"/>	How will you register bidders? Are you selling tickets or just allowing anyone to participate?	
<input type="checkbox"/>	How will you promote registration for the event? Email, social media, call campaign?	
<input type="checkbox"/>	How will you handle package retrieval or delivery after the event?	

Pre Event Checklist

View/Attend Trainings

- Sign up for the recommended training webinars or view on-demand.

Event Night Technology

- Procure event technology equipment. Depending on your plan for streaming, work with an AV vendor for additional needs.
- Build out slides to use during the virtual event pre-show including instructions on how to register as a bidder, how to place a bid, who to contact if they have any questions, mission information, and a thank you to sponsors.
- Build out slides to use during the virtual event including auction package descriptions and images, organizational notes about mission, images of mission in action, and thank you to sponsors.

Project Website

- Publish Cash Donation page.
- Publish Item Donation page.
- Publish Sponsorship page.
- Publish "How to Bid" page.

Project Settings

- Set up receipts.
- Set up Item & Package sections for Online Bidding.
- Verify open/close times of Online Bidding package sections.
- Set up Package Classes.
- Add images to packages.
- Review and edit package descriptions.
- Specify the minimum bid, raise, and the Guaranteed Purchase price (if applicable).

Online Bidding

- View Packages.
- Test bidding site.
- Craft texts to send out in advance, during, and after the event.
- Verify Online Bidding settings-max bidding, display communications, leaderboard, donation button settings.
- Review the Online Bidding Dashboard functions.
- Review and customize any display boards you will use during the virtual event.

Promotion

- Send out email blast for item donations.
- Send a "Save the Date".
- Reminder message to 'Charge your devices'.
- Share Online Bidding instructions.
- Promote the use of an event specific hashtag for supporters to use.

Day-of Documents

'Day-of' Checklist

- Remove test bids (if you've not already opened bidding on packages).
- Load Greater Giving Leaderboard Display and Appeal Display as needed.
- Enter text messages under the Saved Text Messages area on the Send Text Message page in the Online Bidding Dashboard.
- Test run all technical aspects of the virtual event including sound, streaming software, and video quality.
- Bring to virtual venue:
 - Computers and peripheral equipment—laptops, mice, mouse pads, large-screen monitors, mobile phones, tablets, chargers, and extension cords.

Post-Event Documents

Post-Event Checklist

- Run Post-Event reports
 - BID-03—List of sales, sorted by Supporter
 - PKG-03—List of sales, sorted by package
 - PAY-01 —List of payments recorded by each Supporter
 - BID-18—List of all credit cards, amount per credit card, and status. Includes cards on file, charges waiting to be submitted, and charges submitted. Authorization codes and decline status are also included.
- Reconcile sales.
- Submit Charge Batch.
- Send final receipts and thank yous to donors.
- Save Bidding History Report from Online Bidding Dashboard.
- Check for duplicate Supporter records.
- Plan for next event.

For more information on Online Bidding
Success, visit greatergiving.com

Greater Giving, headquartered in Hillsboro, Oregon, is dedicated to providing technology solutions to the nonprofit community in order to improve their fundraising efforts. Greater Giving offers integrated and stand-alone solutions that include event management software, online registration and donation services, online bidding, and on-site payment processing the day of the event, and provides best-in-class customer service for the entire duration of an event.

Since 2002, Greater Giving has processed more than \$7 Billion in credit card payments in support of nonprofit causes for thousands of organizations and schools across the United States. Greater Giving also provides free fundraising education resources throughout the year, including webinars, live seminars, eBooks, guides and blog articles.

Greater Giving is a Global Payments company (NYSE: GPN).

Dedicated
to nonprofit
fundraising
success.

greatergiving

A **Global Payments** Company

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