

**Online Auctions** Cash & Item  
Less Stress Donations  
Purchase Tickets New and Exciting!  
**Leaderboards** Process Payments  
Allows Everyone to Participate  
Guest Convenience Credit Card Swipers  
**Community of 450,000+ Bidders**

## **Mobile Bidding Playbook**

Your Guide to Running a Successful  
Mobile-Enabled Fundraising Auction

Easy to Use **Table Seating**  
**Mobile Bidding** Fast Checkout  
No Waiting in Line Secure Information  
Advertising & Promotion **Branded Homepage**  
More Exposure Anywhere, Anytime Bidding  
**More Bids = More Money**

# Mobile Bidding Playbook

## Your Guide to Running a Successful Mobile-Enabled Fundraising Auction

Thank you for your interest in implementing Mobile Bidding for your next auction fundraiser. You’ve taken the first step towards reinventing your silent auction, and by adding this innovative offering, you can elevate your fundraising to new heights of success.

We want you to know that running a mobile-enabled auction/event is a big undertaking. With that in mind, we’ve created this comprehensive Mobile Bidding Playbook, filled with checklists, timelines, and best practices, which will equip you with information to help you plan and run a successful event.

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## What to Do First

### 1. You must tell us if you are planning to add mobile bidding to your event.

Email [support@biddingforgood.com](mailto:support@biddingforgood.com) or call 1-866-621-0394 to let us know your plans.

This way, we can make sure that in-room mobile bidding is a good fit for your event, that we have adequate staff on-call in Client Services to provide support during the hours of your event, and that you have the guidance and materials you need to plan and run a successful fundraiser. If you do not inform us of your plans, we may not be able to guarantee support during your event.

### 2. Read the “Your Mobile Bidding Auction: Things to Consider” section.

There are many components to running a successful mobile bidding event. For those of you who have run online auctions, many of these components will fit easily within your existing processes, and this is simply a new way for you to raise more money with your auction. Even so, mobile bidding introduces a number of new steps that we strongly recommend you follow in order to make the best use of the platform.

### 3. Mobile Bidding Connectivity and Equipment Assessment

Make sure that your event venue is suitable for mobile bidding - have your tech contact at the venue fill out the Mobile Bidding Connectivity and Equipment Assessment. Contact us at [support@biddingforgood.com](mailto:support@biddingforgood.com) to facilitate your wireless connectivity assessment and to discuss support options for your mobile event.

## Overview

**This Playbook is a comprehensive guide to help organize and run your mobile bidding auction fundraiser.**

**You should read the Playbook if you are the:**

- Auction Chair
- Auction Administrator in charge of setting up the auction in our platform
- Person in charge of the technical aspects of your in-room mobile event (wireless connectivity, equipment, etc.).

It should also be useful to any project leads on your fundraising team; however, it is not meant to replace the one-on-one guidance provided by your assigned Auction Consultant. Please feel free to email [support@biddingforgood.com](mailto:support@biddingforgood.com), or call 1-866-621-0394, or contact your designated Auction Consultant directly if you have any questions or need additional help with any aspect of your event.

For those organizations who are looking for more assistance in the areas of technology and connectivity, as well as in-person support during your event, we also offer Premium Event Services. Please ask your Auction Consultant for more details if you are interested. If you have any questions about online auction fundamentals, you can find comprehensive resources in the Auction Manager, and should also feel free to reach out to your assigned Auction Consultant.

*Please note: The material presented assumes that you have some familiarity with online auctions and with the process of setting up your auction in our Auction Manager tool.*

## How it's Organized

**The Playbook is organized using a framework of checklists to refer to before and during your event.**

The Playbook is organized using a framework of checklists and content that you should refer to and make use of before and during your event. In working with our clients, we have found tools like these to be very effective in helping everyone stay organized.

*Please note: All checklists, timelines, templates, and email campaigns referenced are available electronically; your Auction Consultant can email you any of these materials.*

## Mobile Bidding Auction: Things to Consider

- ☐ **These are questions you will want to consider before you decide to add in-room mobile bidding to your auction:**
  - Number of attendees
  - Number of online items for mobile bidding
  - Number of gavel items (traditional “live” event items with auctioneer)
  - Will there be other fundraising at the event in addition to the auction (raffle, ticket sales, big board, wine wall, etc.)
- ☐ **Multiple fundraising activities may distract from your auction and impact your fundraising.**

If there are competing fundraising activities, consider using designed item sheets (we provide templates), and/or be sure to have a slide show of auction items in a highly visible area.
- ☐ **Do you have an ample number of volunteers available the night of the event?**

We recommend 4 volunteers per 100 attendees. These volunteers should be outgoing and sociable - they'll be interacting with guests.
- ☐ **We recommend having your volunteers to help with:**
  - registration
  - promotion of mobile bidding
  - personal assistance to VIP donors
  - checkout and item fulfillment

### Venue Information

- ☐ **Is the event on multiple floors or buildings?**

Be sure WiFi is available for all of your guests.
- ☐ **Do you have a room layout/floor plan?**

This will help determine placement of registration, items, and checkout tables, as well as bidding tables with laptops, if needed.
- ☐ **Is there an IT person or someone who can be responsible for the technical aspects of the event?**

The success of your event depends on good connectivity and a reliable network.

### Equipment Information

- ☐ **Will you have an adequate number of computers for the event (e.g., laptops, iPads, iPod touches)?**

We advise 5 laptops per 500 attendees, plus 2 additional, for volunteers to perform auction-related activities.
- ☐ **Will you use any AV equipment (projector, screen, microphone, sound system)?**
- ☐ **Do you have your own equipment or will you need rentals?**

### Registration

- ☐ **How will you process ticket sales?**

We highly recommend using BiddingForGood's Ticket Sales feature to streamline registration and reduce check-in lines at your event.
- ☐ **How will you invite attendees - mailed invitations, email, or both?**
- ☐ **Will you allow walk-ins? How will you register them?**

- ☐ **Do you have email lists of your supporters? For what percentage of your attendees do you have email addresses?**
- ☐ **Do you have space for a registration station at the event?**
- ☐ **Do you want to have bidding stations available at the event?**  
We recommend that you have a few laptops/iPads placed throughout the event, depending on the size of the venue and the display of the items.
- ☐ **Do you plan to print auction catalogs, plus handouts, signage, and/or how-to's for mobile bidding?**

## Checkout

- ☐ **What time will you close silent auction items? Is there anything else happening at this time?**
- ☐ **How will you handle checkout and item retrieval the night of the event?**
- ☐ **How will you charge credits cards?** (Stripe, Greater Giving, IATS)
- ☐ **Will you allow for check and cash payments as well?**
- ☐ **When are you planning to finalize all transactions - at the event, or after/ the next day?**  
We recommend that you finalize transactions after your event, to reduce both your workload and winning bidders' wait time at checkout. This works well if you are willing to allow winning bidders to leave with items won, or if they are able to pick up items the next day.

## Build Your Catalog

- ☐ **Select optimized close times for items - decide which items close online, which move into the room, etc.**  
We recommend that you bring an appropriate number of items to your live event relative to the number of attendees you're expecting. Too many items can overwhelm and suppress bidding.
- ☐ **Enable Bid Extension?** The Bid Extension feature allows bidding to continue in five minute increments past the scheduled closing time on high interest items.
- ☐ **Consider using QR codes for your auction items and auction homepage.**  
Our tool automatically creates QR codes for the items in your catalog, for your use on printed item pages at your event as well as the QR code for your auction homepage, for signage and other promotion. The bidder scans the code using a QR reader app, which brings up the mobile website page
- ☐ **Ensure that you have a system for keeping track of your auction items, including gift cards and certificates, at the event, even for items not physically in the room.**  
We recommend an accordion file, organized by item/lot number. Every item in your auction should be represented in the accordion file, with placeholders for those items on display tables and for any items not at the event. This will enable you to deliver awarded items to winners in an organized fashion, and is especially useful if you have packages or gift baskets containing a variety of items.

## Promote Your Event

- ☐ **You can find your custom mobile URLs in the Auction Manager under Event > Mobile Bidding**
- ☐ **Email communication: plan your campaigns to promote your auction and in-room mobile bidding.**

## Prepare Your Bidders

- ☐ **Highlight event and mobile bidding information on your auction homepage.**  
Email announcement re: mobile bidding (mobile URL, instructions for bidding via mobile site)

## Train Volunteers

- ☐ **Volunteers will be trained on:**
  - Registering attendees (if not pre-registered)
  - Helping prepare attendees' phones, (if needed)
  - Helping attendees with bidding
  - Checkout and item retrieval

## Pre-registration and Registration

- ☐ **In Auction Manager, set up your customized URL for your event and registration pages.**  
Go to Auction Manager > Event > Mobile Bidding to find your registration URL and mobile URL. We strongly recommend using this URL as early as possible to promote your auction to your community.
- ☐ **If selling tickets on BiddingForGood:**  
Go to Auction Manager > Event > Sell Tickets to set up your tickets.

## Mobile Email Campaigns

- ☐ **Campaign #1 - 3 weeks before your event:**  
Intro to mobile bidding, pre- register, buy tickets.
- ☐ **Campaign #2- 1 week before your event:**  
One week left, get instructions for mobile bidding ready. Include the venue's SSID and password for accessing their wireless network.
- ☐ **Campaign #3- 2 days before your event:**  
Last chance to streamline easier bidding at the event. Consider offering an incentive for attendees to pre-register, such as a raffle, gift basket, or other door prizes.

## Sell Tickets

- ☐ **Set up tickets. Recommended for easier in-room bidding for your attendees.**
- ☐ **Include "Buy tickets" call to action in your email campaigns.**
- ☐ **Use available reports to keep track of ticket sales and auction registrants.**

## Bidders Who Didn't Register

- ☐ **Have registration stations (laptops or iPads) to collect credit card info.**
- ☐ **Volunteers to help attendees access and bookmark your mobile auction site, sign into wireless network, and register.**

## Three Weeks Before Your Event - Checking In

Here are progress points that you want to check on and assess at around three weeks before your event - there's still time to adjust and attend to anything still outstanding!

### Wireless Connectivity

- ☐ **Very important: Make sure venue has been tested in terms of wireless and connectivity.**  
If the venue's wireless network is password-protected, make sure you have the SSID (network name) and password. What are the steps to get on the wifi?

### Promotional/Printed Material

- ☐ **Make sure you have the custom URL for your mobile auction site [bforg.com/\[yourauctionalias\]](http://bforg.com/[yourauctionalias])**  
You'll use this link, as well as links to your registration and event pages, in your promotions. For ease of use in mobile bidding, you should set up a short auction alias of 3-5 characters, which you can request from your Auction Consultant.
- ☐ **Printed materials for event, with ample time for printing:**
  - Handouts: how-to's, bid sheets, postcards.  
You can request these from your Auction Consultant ([support@biddingforgood.com](mailto:support@biddingforgood.com))
  - Item sheets to be displayed with items
  - Signage/labels for laptops (logout reminders) and items ("sold!")
  - Table tents
  - Catalogs
  - Item/lot numbers and QR codes

### Review Registered Users Report

- ☐ **Do the numbers match with expected attendees?**  
This helps you estimate registration table traffic and highlights if you need to send additional campaigns to encourage pre-registration. If numbers are low, send additional email campaigns to get as many attendees registered (and bidding!) as possible. This helps to ensure that bidding at the event will run smoothly.
- ☐ **Decide how many laptops, iPads, and/or iPod touches you'll need at the event, and get them secured.**

## One Week Before Your Event - Checking In

**One week to go! Here are items that you want to be sure are taken care of, one week before your event at the latest:**

- Build and publish all items; make sure items are closing at times desired.
- Make sure all item/lot numbers are numerical.
- Set bid extension.
- Run updated item inventory report. Go to Auction Manager > Reports > Export Item Details.
- Activate "Display Auction Statistics" on your auction homepage  
- this will help you follow dollars raised throughout the event.

### Payment Processing

- ☐ **Payment processing method confirmed and ready (Stripe, Greater Giving, IATS).**

## Email Promotion



### Last chance to streamline easier bidding at the event.

- Send registration link
- Remind bidders to register before the event
- Explain the benefits: "You can check in faster, there's no waiting to get registered, and you can bid right away!"

## Printed Materials Ordered



- Posters
- Postcards: how-to's
- Table tents: how-to's
- Item sheets
- Volunteer name tags and any additional signage (raffle, wine wall, etc.)
- Printed auction catalog (include item/lot numbers)

## Other



- Create your leaderboard so it can be displayed at your event. Go to Auction Manager > Leaderboards.
- Create staff assignments for event night; who's doing what (registration, helping with bidding, checkout, etc.)
- Create event timeline for staff review and to have on hand at the event.
- Schedule final walkthrough of timeline with staff.
- Review room layout floor plan. Finalize placement of registration, items, and checkout tables, as well as bidding stations with laptops, if needed.
- Confirm that loaner computers and devices are available and are scheduled to arrive in time.
- If you are handing out loaner devices, ensure you have a system for retrieving them at the end of your event (e.g., collecting drivers' licenses, etc.)
- Confirm wireless requirements and test equipment.

## The Day of Your Event: Checklist

The big day has arrived! Be sure to cover the following.

### Set Up Registration Tables



- Laptops/bidding stations with logout reminder signs.
- Bookmark auction items page and auction registration page on each laptop- highly recommended.
- Make sure that signage and handouts with how-to's and auction URL are visible.
- Loaner devices set up and available.
- Projection of leaderboard, if available.

### Set Up Printed Materials



- Table tents on, around tables
- Instructional handouts, how-to's, and logout reminder signs for each laptop.
- Item sheets in front of each item - make sure lot numbers are large and visible.
- If any silent items are also gavel items, mark them as "gavel items," so bidders know.
- Printed catalogs, if applicable



## Item Inventory

- ☐ **Items displayed on tables**
- ☐ **Print the catalog in a spreadsheet.** Go to Auction Manager > Reports > Export Item Details
- ☐ **Check the Exported Items Report against each item sheet on the tables to be sure lot numbers and items match**
- ☐ **Check accordion folder containing gift certificates/placeholders for items in the auction:**
  - Be sure lot numbers are visible, all items are present, and all item details match those in Export Item Details Report
  - If an item is missing, prepare printed instructions to be given to the winner at the end of the night, so they can claim the item later.
  - For all items displayed in the room, put a placeholder note in the file, noting the item is to be retrieved from the room and given to the winner.
  - Make sure all physical items have lot numbers affixed to them.

## Volunteers

- ☐
  - Assign volunteers to work at registration, or as Bid Helpers, checkout helpers, and item runners.
  - Walk all volunteers through registration, bidding, and checkout processes.
  - Assign volunteers to staff bidding stations, if needed.
  - Encourage volunteers to keep an eye out and help anyone in need, and to encourage bidding.
  - Highly recommended: Assign Bid Helpers to specific VIP bidders/donors, if needed.
  - Assign volunteers to collect and monitor auction items before pickup.

## In-Room Promotion

- ☐ **Confirm leaderboard is up and displaying item names, images, and lot numbers on a constant loop**  
This helps keep bidders engaged and bidding.
- ☐ **Instruct Bid Helpers to walk around the room with iPads in hand to help with mobile bidding or last-minute registrations.**
- ☐ **Plan for emcee/auctioneer: auction closing in 30 minutes.**
- ☐ **Plan for additional emcee announcements: auction closing in 10 minutes, auction closing in 5 minutes.**

## Reports to Check Throughout the Night

- ☐
  - Registered bidders
  - Winning Bidders report - this will show when “Buy Now” items are sold and are no longer available for bidding, enabling you to place “sold” signs on those items.
  - Review leaderboard for dollars raised

## Print Materials Set-Up

- ☐
  - How-to sheets displayed in plastic stands - to be placed on item tables, registration table, etc.
  - How-to postcard instructions to be given to each participant at registration tables and stacked on item tables where possible.

## Registration Step-by-Step

1. If attendee HAS already bid in the online auction, have them login on their smartphone:
  - Open web browser and type your mobile URL [bforg.com/\[yourauctionalias\]](http://bforg.com/[yourauctionalias]) to go to your auction
  - If they are not logged in, click on the "Login" option in the top menu; enter username and password.
  - Attendees that have a BlackBerry or standard mobile phone (not a smartphone) will have to register and bid on available laptops.
2. If Attendee HAS NOT bid at all they will need to register on a laptop or their smartphone using the instructions below.

*Attendees that have a BlackBerry or standard mobile phone (not a smartphone) will have to register and bid on available laptops.*

### Register to Bid From Your Smartphone

**Make sure you are on your auction homepage ([m.bforg.com/\[yourauctionalias\]](http://m.bforg.com/[yourauctionalias]))**

1. Click "Register" option in the top menu, and fill in:
  - First Name
  - Last Name
  - Email Address
2. Create a password (7-24 characters) - must contain at least one number
3. Phone number
4. Once you've completed the form, check "I agree to the Terms and Conditions," and click "Save."

### Register to Bid On a Computer

**Go to [registration URL] and fill in the following information:**

1. Click "Register" option in the top menu, and fill in:
  - First Name
  - Last Name
  - Phone Number
  - Email Address
  - Re-enter your new password to confirm
2. Answer the Security Question - this is a generic question to confirm that you are a person.
3. Once you've completed the form, check "I agree to the Terms of Use" and click "Register"

### Forgot Password/Already Registered

**We recommend that this is easier to do from a computer vs a smartphone:**

1. Go to login page and click "forgot password" link.
2. A link will be sent to you to reset your password.

## Checkout/Close of Online Auction

Your online auction and all items will close automatically at the designated time you selected. We strongly recommend that you watch the Close Out video in Auction Manager, to familiarize yourself with the process.

Note: For a smooth close out, we recommend that you choose your auction closing time carefully as part of your advance planning, and make every effort to adhere to it. However, there may be extenuating circumstances that arise during your event that necessitate extending the close time.

As long as your auction is still open, you can modify the close time in the Auction Manager, but we advise you to do so only if absolutely necessary. If you have any questions or concerns about your closing time, you should discuss them with your Auction Consultant prior to your event.

**Using Stripe, Greater Giving or IATS, your vendor will deposit the money into your bank account, minus the transaction fees.**

### Follow these 10 steps to make sure your checkout goes smoothly

1. Volunteers gather all items and place in lot number order at checkout table
2. Print Winning Bidder Report by going to Auction Manager > Close Out > Winning Bidder Report
3. Award all items won (items close automatically when online auction closes)
4. Review Winning Bidder report, refer to accordion file, and mark any items not present in the room.
5. Volunteer reviews printed winning bidder report to confirm with attendee if they won or not
6. Electronic receipts are provided to all winning bidders via email once the items close, if you have enabled this when closing the auction
7. When winning bidder provides their name, call out lot number to volunteers
8. Check off each item on receipt
9. Repeat steps 5-8

### Retrieve Items

- Organize your item runners
- Deploy runner volunteers to gather ALL items and item sheets from the tables and bring to a secure place behind checkout
- Organize items in batches by lot number (1-10, 11-20, 21-30, etc.)
- Assign volunteers to be in charge of batches of lot numbers and to be ready when numbers are called out
- Assign a volunteer to be in charge of the accordion file lot numbers for the gift cards

### Deliver Items

- Set up a checkout table with several queues of volunteers (one winning bidder report per volunteer)
- Depending on your event schedule, consider printing winner receipts and delivering them to winners during dinner or entertainment, to save time at checkout.
- The person in charge of the accordion file stands near checkout with volunteers ready to listen for the first lot number.
- Volunteers check winner's name against Winning Bidders Report.
- If the winner has already paid, volunteer calls out lot number to the person in charge of the accordion file who pulls the gift certificate or lets an item runner know that the item is in the room; runner retrieves item and gives to winner.
- If winner needs to pay, volunteer collects payment, and repeats the steps above.
- Volunteers should inform winning bidders if they will also receive a receipt via email.

## Thank You for Reviewing Our Mobile Playbook!

Following these best practices, tips, and recommendations will help you to run a successful mobile event! We also advise setting up a check-in call with your Auction Consultant. You can email [support@biddingforgood.com](mailto:support@biddingforgood.com) to set up a call. Best of luck with your mobile bidding event!