

A Happy Path for 2021 In-Person and Hybrid Events

Statistics (Averages)	Pre-Pandemic	Pandemic
Items Per Event:	82 items	84 items
Bidders Per Event:	215 bidders	182 bidders
Bids Per Event:	473 bids	576 bids
Winning Market Value:	79%	93%

Data pulled from events that occurred from 2018 through April 2021

Getting through the past year has been a challenging and unique experience. Going forward, ClickBid has gathered data and experiences to build a “happy path” for your upcoming gala.

A happy path is our strongly recommended step by step guide for setting up and running your post pandemic events. **We strive to be crazy simple for you and your guests.** Our happy path comes from thousands of events and from features we've added to navigate virtual events. Following is our recommendation for a very successful and painless hybrid (in-person and remote) event. NOTE: For each section, we provide an overview of our recommendations. Following our recommendations, we provide specific guidance in using the ClickBid platform.

Communication Strategy

Possibly the most important part of your auction is the communication you have with your donors. Giving clear and repetitive information on your event will boost participation and remove confusion.

Break your communication strategy into Before, During and After sections. Before, you want to let donors know how to get tickets, what they can expect from the event and what is available to bid on. Use social media to show off individual items. Tell your donors that tickets are on sale and going fast.



Tell them that they can still bid on silent, live and even watch the program from their homes if they cannot attend in-person.

Right before and during the event, get more specific about how to log in, how to bid and when things happen. Remind donors when the auction closes, when the live auction starts, etc.

After the event, share the recorded broadcast, summarize the success of the event, share some photos and give a huge thanks.

It may sound like a lot of communication but we've got you covered. [Here's a link to a strategy](#) built with collaboration from one of our organizations.

COMMUNICATIONS AGENDA & PRESS RELEASE TEMPLATE

Fill in the dates below based on your specific timeline. Typically, we recommend starting your plan a few months before the event. Each event is unique, so feel free to add and remove dates as needed with the goal of a completed plan that you can share with your team and work from consistently.

Important Dates - Complete these dates to help fill in the additional dates below.

__/__/____ - Auction Start

__/__/____ - Auction Close

__/__/____ - Live or Virtual Event Start

Invitation Card Mailing - Several months before the event.

__/__/____ - Save the Date - [templates](#)

Press Releases

__/__/____ - Pre-event Release - Several to one month before the event.

__/__/____ - Post-event Release - Several days after the event.

ClickBid's [Mass Messaging service](#) can help you keep bidders and guests aware of your updates, news, etc. You can find this feature under the [Bidders](#) tab. Mass Messaging also allows you to save your messages to use later and even filter them to specific types of bidders and guests.

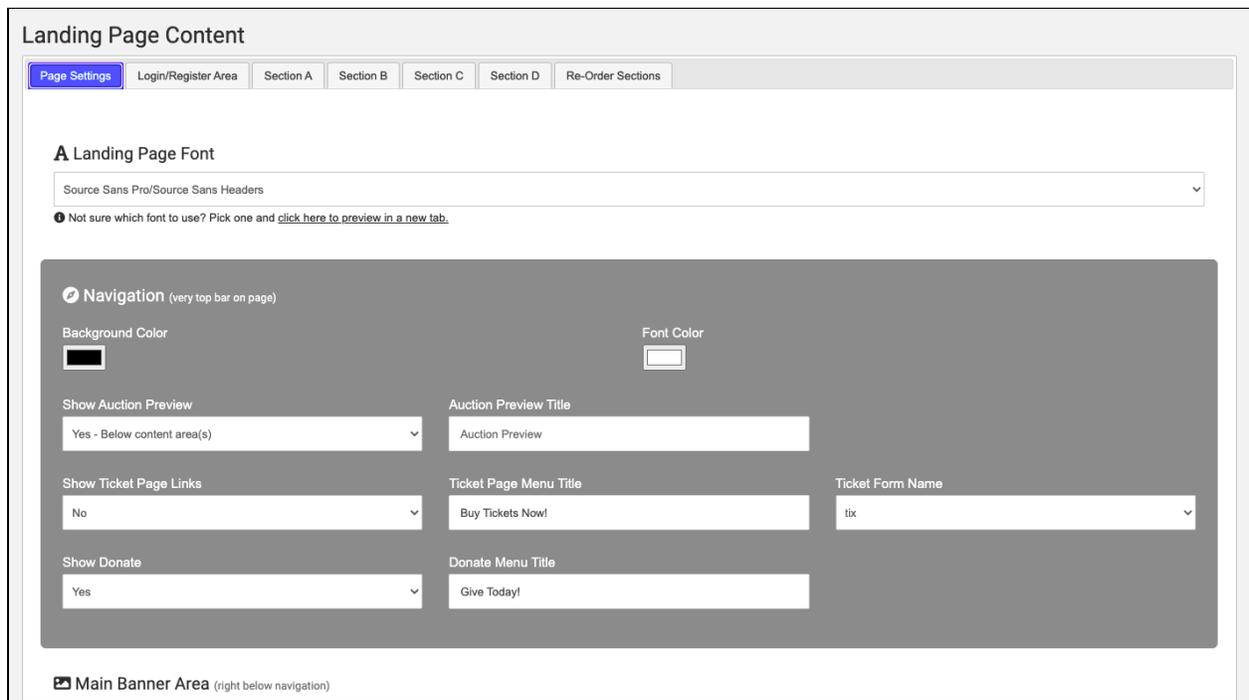
Event Landing Page

KEYWORD.cbo.io

This is your hub (we call it a [landing page](#)). A single site for anything related to your event. It's all about "crazy simple". From here, your visitors can learn about the event details, buy tickets, make a donation, see what is up for auction, donate an item to the auction, buy a raffle ticket and so on.

You can customize the look and feel of the landing page as well as the content and smart features that are loaded into it. We recommend dedicating content areas to key elements of your event. For instance, a content area about the event, another content area to discuss the fund-a-need, another content area to tell a little about your charity and a content area to show off pictures and videos from previous events.

When we say “smart features” we mean dynamic and interactive elements. For instance, add a donation form and thermometer to the fund-a-need content area, an auction item submission form to the “about our event” content area, an activity feed above the picture from last year and so on. This keeps the site fresh so guests return several times before the event.



To edit your landing page, go to the [Software Settings](#) tab. From there, choose [Landing Page Content](#). This page allows you to edit the general settings of the landing page (font, color, main banner image, navigation, social media, etc). We also break down the individual content areas that you can name and add your own content to. Lastly, you can edit the required information for bidders who log into your event under the [Login/Register Area](#). Pro Tip: Open a new tab on your computer with your landing page and after making changes on the [Landing Page Content](#) admin page, refresh to see how things look.

Tickets

Setup a ticket page in ClickBid to register your guests, collect meal choices, donations, corporate donation matches and more. You can also sell virtual tickets for anyone who cannot attend. Let people know the virtual ticket includes a live broadcast of the main program, live auction, silent auction, and paddle raise.

ClickBid will store your registrations in your ticket page area. Purchasers can become a registered bidder automatically and have their credit card information retained.

When you're ready to open the auction, send a mass message to registered guests so they can complete the bidder login process and start bidding.

Modify Tickets

🔔 Your ticket page url is: <https://cbo.io/mbdemo/tix>
Use this URL to create links or buttons on an existing web page or in emails to your supporters.

[+ Add Individual Ticket](#)

Ticket Name	Price	FMV	Tickets/Purchase	Quantity Available	Drop Downs	Discount Codes	Discount Prices	Tools
Regulars	✔ 115.00	75.00	1	200	9	50percent, 20percent, adsfasdf	60.00, 90.00, 10.00	✕
Table Sponsor	✔ 1000.00	0.00	10	0	3			✕
Sponsor Come Ticket	✔ 0.00	0.00	1	200	10			✕

[+ Add Sponsor Level](#)

Sponsor Level	Price	FMV	Tickets/Purchase	Quantity Available	Tools
Big Time Sponsor	✔ 2000.00	0.00	10	10	✕

In your ClickBid admin, go to the [Event Tickets](#) tab. You can control your ticket page settings such as the hero image, event information, payment options, etc from the [Ticket Page Settings](#) link. The [Manage Tickets](#) link allows you to set up tickets for individuals, sponsors, underwriting, add meal choices and more. [View Ticket Sales](#) allows you to view and manage any ticket sale that comes in. All your guests can be viewed and edited under [Manage Guests](#).

We recommend that you use the Mass Messaging service under [Bidders > Email \(or Text\) Bidders](#). This will let you message your guests and allow them to become bidders seamlessly and start participating in your auction.

Pro Tip: Using our ticketing system, you can avoid allowing guests to “register to bid” on the landing page. This keeps guests flowing through the same path. Go to the [Software Settings](#) tab and choose [Landing Page Content](#). Select [Login/Register Area](#) and then set “Show Register Now Button” to No and “Enable Text to Register” to No.

One More Tip: Testing is key. Submit a few tickets by using the [Enter RSVP Ticket](#) in the [Event Tickets](#) tab and make sure the process is clear once you make it public.

Auction

Shortly after you have your ticket page running, start building your auction catalog. How many items should you have? On average, our organizations sell between 80-100 items. We support silent, live, donation, quantity, and raffle item types to name the most popular. Upload images, set descriptions, exceptions, starting bids, increments and more from a single admin page.

Looking for a few more unique items? ClickBid has partnered with [TravelPledge](#) to help you find one-of-a-kind items either from around the world or in your backyard. Using TravelPledge is free and they offer the highest payout rates in the industry. You can even get started from your ClickBid admin.

Manage Items

All Items

+ Add Item 4 items of 1000

✔ Edit Item
✖ Delete Item
⚡ Quick edit

Copy Excel CSV Show/Hide Show 10 entries

<input type="checkbox"/>	Name	Number	Tags	Category	Closing	Status	Start	Raise	Type	FMV	Buy Now
<input type="checkbox"/>	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>	Fund-a-Cause	101	has bids		06/09/21 7:00 pm	Closed	1	1	Donation	0	
<input type="checkbox"/>	Sample Live Item	103	has bids eventstream		06/09/21 4:00 pm	Closed	2500	250	Live	5000	
<input type="checkbox"/>	Signed Guitar	100	has bids		06/09/21 7:00 pm	Closed	1	1	Silent	Priceless	
<input type="checkbox"/>	Signed Guitar	102	has bids eventstream		06/09/21 3:55 pm	Closed	1000	500	Live	5000	

Previous 1 Next

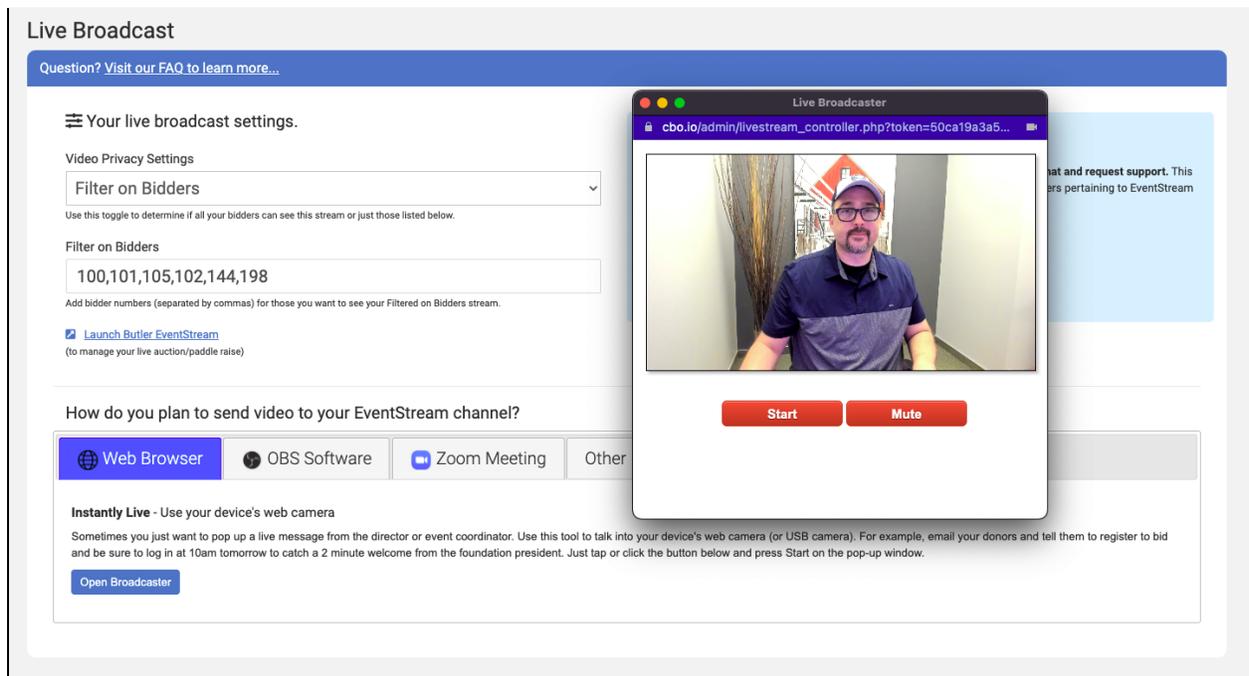
Showing 1 to 4 of 4 entries

All your auction item needs are handled in the [Items](#) tab. [Manage Items](#) allow you to add, edit, view bids, delete, etc. You can also print display cards, manage your categories and donors all from this tab. At the bottom of the [Manage Items](#) page you can download a sample spreadsheet that can later be used to

import your items. Use this spreadsheet on Google Sheets or Microsoft 365 so that others can add and edit together.

The Week Before the Event

Launch the event the Monday before the gala and announce a special broadcast from the director of the charity. From your ClickBid admin, launch the web camera tool and broadcast right from your office or home. For this presentation, the more real it is the better. Let the audience know a day or two before that this will be the kick off of the event. In fact, indicate that anyone who places a bid on opening day is entered into a drawing. Each bid is an entry to win a door prize!

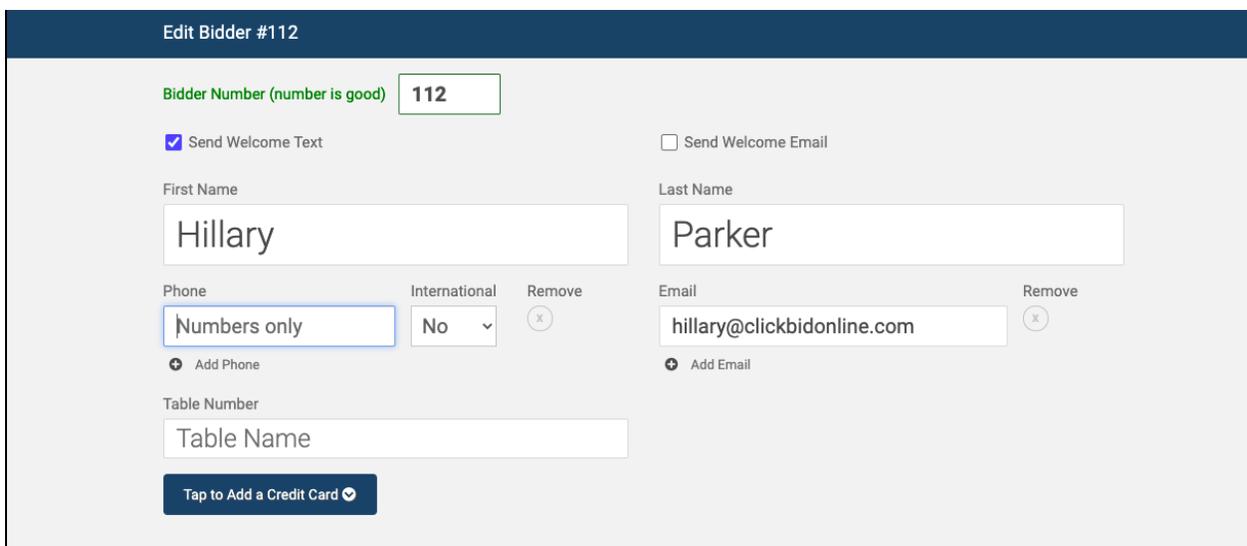


When you activate the EventStream service, you will see a new link under the **Event Central** tab called **Live Broadcast**. This page allows you to control your live video channel. The easiest way to broadcast live is to press the **Web Browser** option (in the row of 4) halfway down the page and then click the **Open Broadcaster** button. ClickBid will turn on your web camera and let you broadcast to your bid site just like you were having a Zoom meeting. Just press **Start** and **Stop** to control when you are broadcasting.

In addition, you can use the **OBS Software** option (in the row of 4) on the **Live Broadcast** page to get your unique streaming credentials. These can be used in our customized version of broadcasting software that supports real-time broadcasting. You can also copy and paste them into an email for your A/V team.

Check-In

Historically one of the more complicated and hectic portions of the event, ClickBid provides a way to completely remove the need to check in. Simply message your bidders and guests before the event to let them know that checking in is not required. Do you have table assignments? Include the table number in the text message. If you're using paddles, place them at each table before the event. Let guests know that if they have any questions, they can stop by a help table where a volunteer or authorized representative can assist with changes.



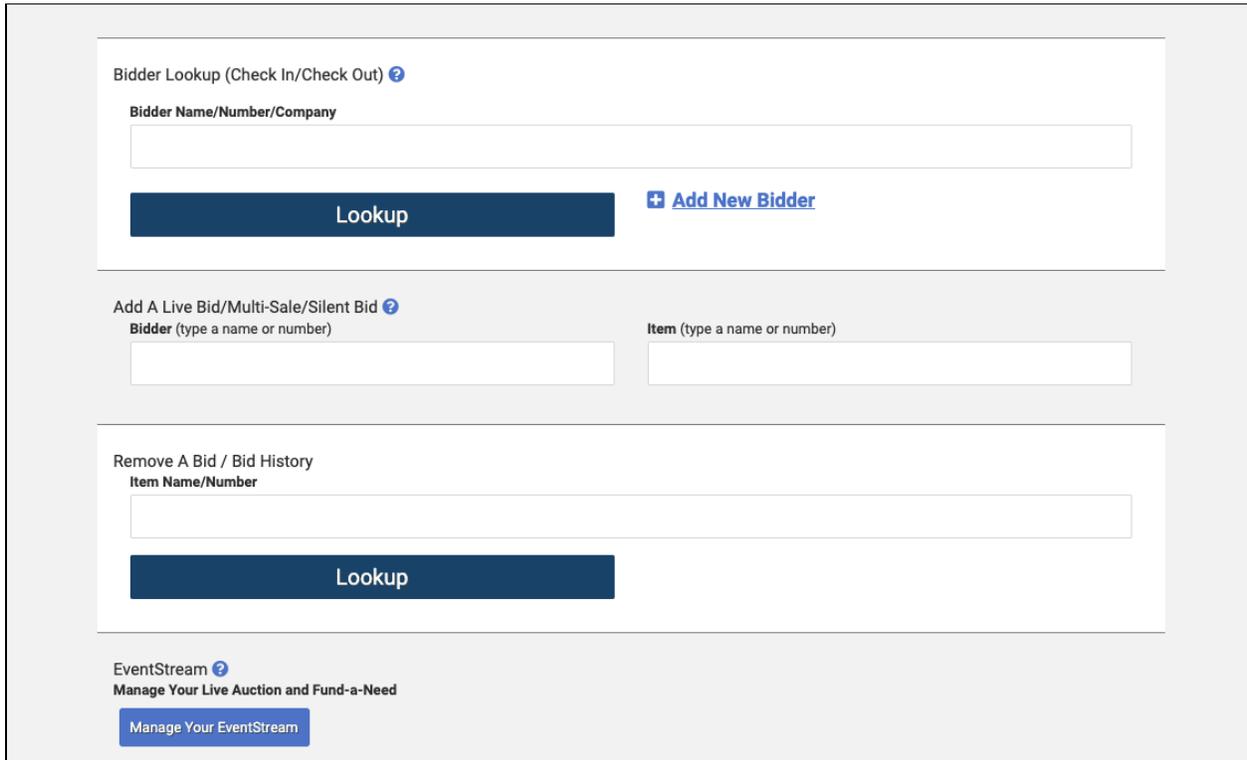
As a volunteer you can log into the **Butler** tool which is a simplified version of ClickBid's admin. Just go to the **Event Central** tab and choose **Launch Butler**. You can also send your volunteers to <https://cbo.io/butler> where they can log in with an event id and password.

The **Butler** tool allows a volunteer to view, edit, and create a bidder record. Just enter some or all of the guest's name into the **Bidder Lookup** box. Then, tap on the result to see their information. You may wish to change the phone, email, name or table assignment. Completing this process will send a new welcome text message to the guest with their table (if assigned) and customized bidding link.

Bidding

Once check-in settles, the focus shifts to helping guests bid. ClickBid makes the bidding process crazy simple so that you can focus on delighting your guests. While guests walk around the auction tables or

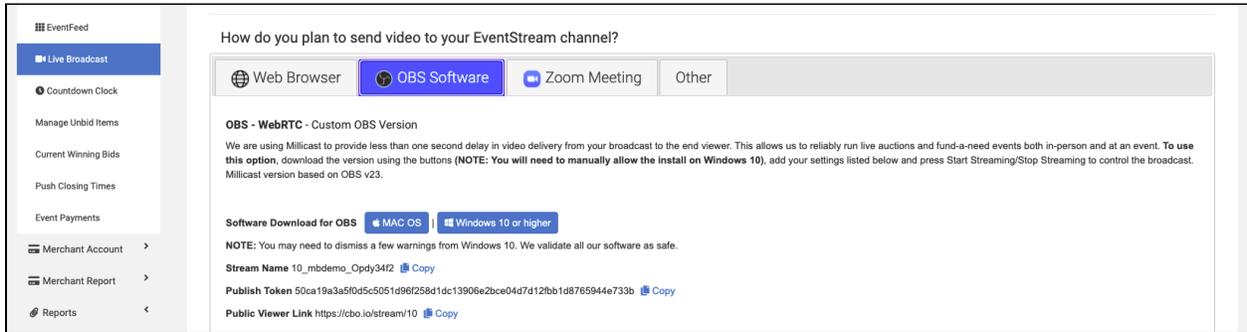
mingling by the bar, your volunteers can “check up” on the progress by asking if there are any questions. Using our simplified Event Butler tool, volunteers can quickly and easily look up bids, place bids, and remove bids for guests. More importantly, your volunteers (advocates of your charity) can check up on the overall enjoyment of your guest’s experience.



When working with volunteers, have them open the [Butler](https://cbo.io/butler) tool <https://cbo.io/butler> to access the simplified admin tools. They can edit a bidder’s record, create a bidder, modify a bidder, add a bid, and remove a bid all from a mobile friendly site.

Broadcasting

For anyone who cannot attend, let them watch the program from their device. Your ClickBid account has the proper codes to give to your A/V team so they can easily set up real-time broadcasting of the event. ClickBid offers less than one second delay to make sure your at-home participants and in-person participants can join in on the live auction and fund-a-need.



To find your broadcasting settings, go to the [Event Central](#) tab and choose [Live Broadcast](#). From here you can change who has access to your broadcast as well as options on how to send content to your EventStream channel. The default option that is selected is [OBS Software](#). This section provides your unique credentials and links to download our customized version of the popular OBS software. This is free software that lets you assemble a unique program that you can broadcast.

Live Auction

When you're ready to bring in those amazing live bids, your auctioneer can work with a volunteer or ClickBid on-site support representative to manage all the action. For the auctioneer, they simply open a link that is sent via text or email. This links to our confidence monitor. It shows, in real-time, any and all live bids that come into the platform. This could be a bid in the room or a bid from someone's home. It's all collected and displayed automatically for the auctioneer to see. From there, the auctioneer does what they do best - sell auction items.

The volunteer opens an item for bidding, sells it, removes bids and accepts "floor bids" (bids made in-person). ClickBid keeps everyone in step with the action.

VIDEO FEED

Show Feed

ITEMS

[Unsold Live Items](#)
[Sold Live Items](#)
[Donation Items](#)

#102 - Signed Guitar x

#103 - Sample Live Item

Launch Confidence Display

Send Confidence Display: Send

HOW TO USE THIS PAGE

1. Tap on an item above to prep it for bids.
2. Tap on "Start" to open bidding online and in person.
3. Tap on "Sell" to stop all bidding.
4. Repeat
5. Tap "Donation Items" then an item to show history and total.

If you would like to change the page mode to view only, click the "Launch Confidence Display" button above.

BIDDING DETAILS

#102 Signed Guitar i

105 - Terry Anderson

Next: \$3,000 **Current: \$2,500**

Start/Sell	Floor Bid	Starting Bid	Minimum Bid
Start	<input type="text" value="Bdr #"/>	<input type="text" value="1000"/>	<input type="text" value="500"/>
Sell	Submit	+100	+250
Re Open		+1,000	-100
		-250	-500
		-1,000	

HISTORY ● Bid placed by volunteer.

- \$2,500 (105) Terry Anderson 06/09/21, 03:48:47 PM x
- \$2,000 (Floor Bid) Place Holder 06/09/21, 03:48:01 PM x
- \$1,750 (105) Terry Anderson 06/09/21, 03:47:48 PM x

In your ClickBid admin, go to the [Event Central](#) tab and choose [Launch Butler](#). Then, locate the [Manage Your EventStream](#) button and choose it. You will need to type “yes” to indicate that you are the one who is controlling the live bidding for remote bidders. We recommend that you have a dedicated volunteer or staff member manage this page. In addition, find an area at your event where they can clearly hear the auctioneer.

Before the live auction, enter the auctioneer’s mobile number or email address into the [Send Confidence Display](#) textbox. This gives the auctioneer a mobile friendly display of real-time bids and donations right on their device.

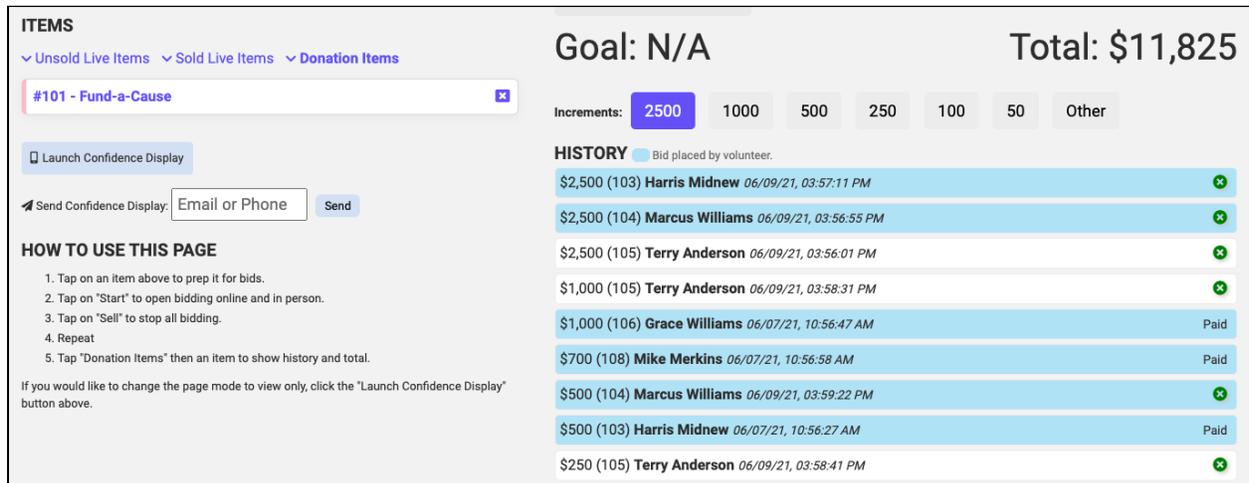
When the auctioneer announces the first live item, click on the item’s name in the Unbid Items list. This will let bidders preview the item from home while the auctioneer is discussing the details.

When the auctioneer starts the bidding, press the green [Start](#) button. This will allow bidding from home in real-time. Bids will appear below the [Start](#) button. When someone bids in-person, press the green [Submit](#) button under the title Floor Bid. This logs an in-person bid so that remote bidders stay “in sync”.

When the auctioneer says “SOLD”, press the green [Sell](#) button to close the item for bidding. It’s possible that a winning bid slips in from a remote bidder. No worries, you can press the green [Re Open](#) button to let the bidding continue.

Paddle Raise

Make a smooth transition from the live to the paddle raise. Anyone can participate; whether from home or in person. The auctioneer can instantly see who has given when their name appears on the same confidence display they used during the live auction. Totals and names can also be on display both in the room (on projected displays) and at home within the broadcast.



ITEMS

[▼ Unsold Live Items](#)
[▼ Sold Live Items](#)
[▼ Donation Items](#)

#101 - Fund-a-Cause

Launch Confidence Display

HOW TO USE THIS PAGE

1. Tap on an item above to prep it for bids.
2. Tap on "Start" to open bidding online and in person.
3. Tap on "Sell" to stop all bidding.
4. Repeat
5. Tap "Donation Items" then an item to show history and total.

If you would like to change the page mode to view only, click the "Launch Confidence Display" button above.

Goal: N/A **Total: \$11,825**

Increments:

HISTORY Bid placed by volunteer.

\$2,500 (103)	Harris Midnew	06/09/21, 03:57:11 PM	<input checked="" type="checkbox"/>
\$2,500 (104)	Marcus Williams	06/09/21, 03:56:55 PM	<input checked="" type="checkbox"/>
\$2,500 (105)	Terry Anderson	06/09/21, 03:56:01 PM	<input checked="" type="checkbox"/>
\$1,000 (105)	Terry Anderson	06/09/21, 03:58:31 PM	<input checked="" type="checkbox"/>
\$1,000 (106)	Grace Williams	06/07/21, 10:56:47 AM	Paid
\$700 (108)	Mike Merkins	06/07/21, 10:56:58 AM	Paid
\$500 (104)	Marcus Williams	06/09/21, 03:59:22 PM	<input checked="" type="checkbox"/>
\$500 (103)	Harris Midnew	06/07/21, 10:56:27 AM	Paid
\$250 (105)	Terry Anderson	06/09/21, 03:58:41 PM	<input checked="" type="checkbox"/>

Have the volunteer, who is running the EventStream page, choose [Donation Items](#) from the horizontal menu on the left side of the page. Tap on the first donation item listed to load the item for giving. This will add a "Give Live" button to the bid site. The volunteer will see giving increments listed to the right. A blue background indicates that the increment is visible on the bidding site. You can tap the increments to show and hide them (along with the "other" option). This should be in coordination with the auctioneer who is asking for donations from guests in-person. To add donations that are given in-person, use the [Appeal/Raise the Paddle](#) tool in the [Butler](#) landing page.

For the auctioneer, nothing needs to be clicked on or changed in order for them to see all donations coming into the system. They will automatically appear and they can choose to call them out as they come in.

Checkout

No more lines at checkout. Bidders who win can pay from their phones immediately following the auction. With their paid receipts they can approach the pick up table to gather their items. Prefer to pay with a check, cash or other form of payment, leave your payment at the checkout area and then



pick up your items. Volunteers are able to confirm payment, write down winning items on a slip of paper and give it to a runner to pick up the items. We typically recommend up to three volunteers to run items for every volunteer who confirms payment and delivery.

Checkout for **Harris Midnew (103)**

Item (number)	Qty	Bid Amount
<input checked="" type="checkbox"/> Fund-a-Cause (101)	1	\$2,550.00
<input checked="" type="checkbox"/> This helps cover our credit card fees.		\$92.56

Total: **\$2,642.56**

This Checkout Total includes applicable tax
If you are ready to checkout this bidder, choose a payment type, then **confirm/correct the information.**

Credit Card Cancel

Tap to Cancel New Card ↻

Payment Details

Card Number

Your checkout staff should be broken into two groups: checkers and runners. As stated, we recommend up to three runners per checker. The checkers will use the ClickBid **Butler** located at <https://cbo.io/butler> to look up bidders who are ready to pick up their items. If paid, there will be a green **Paid Items** button. If they have not paid or need to pay for additional items, there will be a red **Checkout** button.

Tap on the green **Paid Items** button to see a list of items won. Write down the item numbers on a small piece of paper and hand it to a runner. Tell the guest that their items will be delivered shortly and move on to the next guest.

If they still need to pay, choose the red **Checkout** button and process their payment. You can then write down the item numbers on a small piece of paper and hand it to a runner. Tell the guest that their items will be delivered shortly and move onto the next guest.