

ACCOUNT FACT SHEET

Company _____ Phone # _____

CEO _____ ECC _____

Campaign 2009 Gift _____ # Employees _____

Campaign 2010 Goal _____

- Meet with CEO _____(date)
By Aug 19
- Meet with ECC _____(date)
- Schedule employee meeting
_____(date)
- Schedule speakers and program
provider tours through United Way
office
- Advise United Way of all campaign
meetings scheduled
- Gather supplies for meeting:
 - Pledge cards
 - Campaign video
 - United Way pens
 - Banner, pennants, balloons
- Check on progress _____(date)
- Check on progress _____(date)
- Check on progress _____(date)
- Check on progress _____(date)
- Email Account Tracking Form to LE Team
Leader **WEEKLY**
- Turn in pledges and money to
United Way office**
- SAY THANK YOU!!! Write a personal note to
CEO & ECC.
- Verify that United Way office has all
paperwork from ECC
 - Summary sheet signed by ECC
 - UWay copies of pledge cards
 - Signed corporate pledge card
- Make reservations and attend the
Community Report Luncheon
**September 24, Round Building, Taylor
County Expo**
- Make reservations and attend the
Community Report Luncheon
**October 29, Round Building, Taylor
County Expo**
- Make reservations and attend the
Community Report Luncheon
**December 3, Round Building, Taylor
County Expo**