

CHECKLIST

CROWDFUNDING FULFILLMENT READINESS

FROM CROWDFUNDING TO
CUSTOMERS

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INTRODUCTION

Welcome to your go-to guide for shipping Kickstarter and Indiegogo rewards smoothly. Turn your campaign momentum into backer satisfaction and real revenue.

This checklist gives you a clear, actionable workflow for physical reward fulfillment, from factory packout to first ship wave. It helps you spot common pitfalls early so your backers stay confident.

Use it to decide if a third-party logistics provider (3PL) is the right fit for your campaign. Then hand off clean specs, timelines, and backer data so fulfillment runs with fewer surprises.

How To Use This Checklist

Complete this checklist in order, top to bottom. Share the same version with your manufacturer and 3PL, so everyone follows the same plan.

Keep one source of truth for specs, tier mapping, and backer data to avoid mismatched files and last-minute rework.



About The Campaign

Use this section to capture your campaign basics in one place. Fill it in first, then share the same version with your team and your fulfillment partner so everyone is working from the same details.

Campaign Details			
Platform		Total Raised	
Fulfillment Deadline		Estimated backers range	
Target ship month		Destinations	US ____% EU ____% ROW ____%
Add-ons ☐ Yes ☐ No		Product flags (check all that apply) ☐ Fragile ☐ Battery ☐ Liquid ☐ Magnet	

Keep this checklist in mind after you filled everything.

- ☐ Campaign Goal Achieved
- ☐ Funds Received
- ☐ Fulfillment Budget Set
- ☐ Contingency Budget Included
- ☐ Contact info updated (email, phone)

Tip: If any field is still unknown, write “TBD” and add the date you plan to confirm it.



Product and Packout Specs

This section locks your final product and packout specs. Do this before you set shipping prices or confirm your fulfillment timeline, since small packaging changes can change carton size, weight, and costs.

Tip: If one item is still changing, mark it as “TBD” and do not finalize shipping estimates until it’s confirmed.

Why it matters: Locked specs prevent surprises during fulfillment.



Checklist

- ☐ SKU list and variants confirmed
- ☐ Unit weight and size confirmed
- ☐ Tier build photos added
- ☐ Packaging choice finalized
- ☐ Shipped carton details confirmed
- ☐ Inner pack and master carton counts confirmed
- ☐ Carton labels and barcode plan finalized
- ☐ Insert and bundle rules finalized



Inbound Freight and Receiving Readiness

This section makes sure your inventory can move from the factory to the receiving dock without delays. Treat inbound as a project milestone. If inbound slips, every ship update slips with it.

Confirm who is handling freight and record the forwarder's contact details so handoffs stay smooth. Lock your Incoterms early (FOB, CIF, etc.) to clarify cost responsibility and responsibilities at each leg.

Set your ETA based on booking details, then confirm the receiving warehouse address, rules, and appointment process so pallets can be checked in without delays.

Watch for:

Customs holds, port congestion, and missing paperwork can push receiving back by days. Build buffer into your timeline and keep documentation organized in one folder.



Checklist

- ☐ Freight forwarder selected
- ☐ Estimated Arrival Date (ETA) confirmed
- ☐ Receiving warehouse selected (if not using 3PL)
- ☐ Receiving schedule coordinated



Tier Mapping and Kitting Plan

This section turns your reward tiers into clear build rules a warehouse can follow. It's the bridge between what backers selected and what gets packed into each box.

Start by listing every tier and confirming exactly what goes inside. Then flag which tiers need kitting, inserts, or special handling, so nothing gets decided on the fly during packout.

Tip: Do a quick "first kit" test for your highest-volume tier and adjust instructions before wave one starts.



Checklist

- ☐ All reward tiers defined
- ☐ Kitting requirements (if any) identified
- ☐ Kitting instructions documented
- ☐ Components per tier itemized
- ☐ Storage space allocated for components

Notes



Backer Data and Survey Setup

This section is where your campaign turns into shippable orders. Your goal is clean backer data before labels print, so packout does not get stuck fixing missing unit numbers, bad postal codes, or duplicate entries.

Tip: Keep one “final export” file name and version, and only update it when you announce a new cutoff.



Survey Platform Used	Total Responses

Checklist

- ☐ Surveys sent
- ☐ Survey response rate monitored
- ☐ Data exported to CSV
- ☐ Data scrubbed and cleaned
- ☐ Shipping addresses validated



Shipping Plan and Wave Schedule

This section locks how rewards will ship and in what order. A clear carrier plan and wave schedule keeps costs predictable and makes it easier to tell backers when tracking will go out.

Tip: If you are releasing tracking in batches, plan extra support coverage the day tracking drops.

Checklist

- ☐ Ship Carrier(s) selected
- ☐ Shipping rates negotiated
- ☐ Wave Schedule Defined (e.g., by tier, region)
- ☐ Shipping labels created
- ☐ Shipped carton details confirmed
- ☐ Tracking information ready



