Web Advocacy Training for Campaigners

eCampaigning Roadmap

These training materials have been prepared by Aspiration and Radical Designs

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Learning Goals

▶ Enumerate steps to develop online strategy

▶ Stress importance of goal identification

▶ (Briefly) address technology selection

- ▪ Review core tool checklist

▶ Emphasize importance of data as core asset

▶ Consider full eAdvocacy life cycle

▶ Discuss organizational process

Developing an Online Strategy

- ► Define online campaign goals
  - ▪ Make goals measurable and achievable
  - ▪ e.g. Building List, Increasing Traffic
- ► Identify campaign target (if applicable)
- ► Identify online audience(s)
- ► Identify online tactics
- ► Develop your "frame" and message

Developing an Online Strategy

► What are your campaign goals?

- Influencing decision makers
- Mobilizing for and Event
- Building Community
- Reaching and Education Audiences
- Raising Money
- Building your Base

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Developing Online Strategy

► Online tools aren't a magic bullet

- You need
  - An achievable campaign goal
  - A compelling message
  - Effective tactics to realize goal
  - A plan for engaging supporters and well-defined ways for them to plug in

► It's much more about organizing challenges than technology challenges

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Identify Necessary Tools and Technologies

► Make sure they support your online campaign goals

► Strive to keep tech footprint small

  ▪ Simplicity is Power

► "Bleeding Edge" technology is rarely advisable

  ▪ Exception: "Edge Tactics"

► Be aware of data integration issues

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Core Tool Checklist

▶ Content Management System

▶ Constituent Relationship Management System

▶ Email Delivery Tool

  ▪ Need to use a service for 'deliverability'

▶ Donation Processing

It's about data, not technology

- eAdvocacy tools are a means to building relationships with your base
    - Your data is a record of those relationships
    - Well-maintained data sets are your digital power
- Plan for the cohesion & security of your data
    - Know your universe of information
    - Know where it lives; back it up redundantly
    - "Have control of it"

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It's about data, not technology

► Three pragmatisms

- Have well defined privacy policies & follow them
  - This includes physical security and backup
  - Bad privacy = loss of trust = loss of base
- Understand migration options in advance
  - Avoiding platform lock-in lets you evolve your technology strategy as the offerings evolve
- Think twice about what data you store long-term
  - Too much data can be a liability

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Consider Full eAdvocacy Life Cycle

► How much training is in the budget?

- Long term support and upkeep budgeted?

► Has eAdvocacy been introduced into org workflow?

- How will tools integrate with existing tech?
- What happens to data after campaign?

► How will you measure successful adoption?

► Do you have a plan for addressing failure?

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Develop Organizational Process

► Have an agreed process for developing web and email content

- Identify all organizational stakeholders
- Make sure all stakeholders are involved

► Have a well-defined decision path for outbound communication

- How many steps to get a green light?
- Who makes the final call?

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Develop Organizational Process

- ► What is your organizational workflow for sending out a campaign message?
  - How long will it take to send out an email in an emergency?
- ► Bottom Line: campaigner need access to
  - Stakeholders
  - Content resources
  - Decision making authority

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Develop a Campaign Calendar

▶ Envision your entire campaign at the outset

- Resist temptation to focus on near term tactics

▶ Can you narrate your campaign calendar as a story that spans your timeline?

- *"We'll do general education 3 months out, get supporters focused with online actions 2 months out, then pump up email delivery frequency in the 4 weeks leading up to mobilization date"*

▶ Engage users ever during lulls in your campaigns

- Good time for fundraising or education activities

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Section Summary

- Know the steps to develop online strategy
- Specify your goals, know how to track them
- Never forget data is your core asset
- Model eAdvocacy in life cycle terms and you will live to campaign another season
- Be intentional about defining and following organizational process from the beginning

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End Of Section

►Questions?

►Comments?

Thank You!

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