

Email For Advocacy and Community Organizing: Basics, Essentials, and Best Practices

Email Campaign Roles

These training materials have been prepared by Aspiration in partnership with Radical Designs and ScoutSeven

Funded by the Community Technology Foundation of California

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Learning Goals

- ▶ Define roles and responsibilities in email campaigning
- ▶ Understand skills required in each role
 - Communication between roles is critical
- ▶ Appreciate importance of “checks and balances” between roles
- ▶ Appreciate the importances of “testers”

Email Campaign Roles

- ▶ A range of roles need to be filled in any online campaign
 - One person may serve in more than one role
 - Important to establish checks & balances
 - “Sanity checks” are essential at every level
 - Critical to have a decision-making process on how, when and to whom emails are sent
 - Success of campaign depends on successfully coordinating roles

Email Campaign Roles

► Roles

- Online Campaign Manager
- Issue Campaigner/Organizer
- Fundraiser
- Tech Support Person
- Designer
- Testers and Focus Groups
- Email Service Providers

Online Campaign Manager

- ▶ Oversees the online campaign workflow
- ▶ Responsible for composing emails
 - Collects and edits required information
- ▶ Creates tone and focus for communication

Online Campaign Manager

- ▶ Develops and oversees delivery schedule
- ▶ Works with technologists & service providers
- ▶ Manages communication between organization and supporters

Issue Campaigner/Organizer

- ▶ Understands the dynamics and nuances of the issue area(s) and communities
- ▶ Provides the content to educate and engage supporters in:
 - Goals of campaign
 - Activities of your organization
- ▶ Helps online campaign manager develop messages and actions that go into emails

Fundraiser

- ▶ Develops the timing and messages to ask for money from your supporters
- ▶ Works to synchronize online and offline fundraising priorities and goals
 - Integrates them into overall email campaign
- ▶ Manages follow-up and evaluation of online appeals

Tech Support Person

- ▶ Understands technical & online infrastructure
 - Focuses on the “how”, not the “what”
- ▶ Solves technical problems
 - Spam filters, email forwarding, attachments
- ▶ Responsible for “cleaning” data
 - Database management, “bounce” processing in your email system
- ▶ Techs should not make campaign decisions

Designer

- ▶ Makes email messages visually engaging
- ▶ Matches campaign to look and feel
- ▶ In the campaign life cycle,
 - May only be needed when designing templates for emails
 - Or, may provide graphics in each of the emails sent out, on a regular basis

Testers & Focus Groups

- ▶ Review messages before you send to “world”
 - Provide message feedback and proofreading.
- ▶ Help prevent big mistakes in emails you send
 - Always have a small group of people you send to before you blast to your list
- ▶ Have knowledge and experience in
 - Issue area
 - Event logistics
 - Online campaigning

Email Service Providers

- ▶ Provide the technology to send emails and manage your lists of addresses
 - Manage “deliverability”
 - Track and report on email delivery
- ▶ Assure that data is secure
 - Back up and security of your information
- ▶ Sell services on contract basis
 - Application Service Provider (ASP)

Section Summary

- ▶ A range of roles needs to be filled in any successful email campaign
 - The smaller the org, the more roles played by each person
- ▶ Understanding the roles is essential to establishing healthy process
- ▶ A variety of different skills are needed in a successful email campaign

End Of Section

- ▶ Questions?
- ▶ Comments?

Thank You!

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