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

Email Campaign Road Map

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

Funded by the Community Technology Foundation of California

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Learning Goals

► Understand the email campaign life cycle

► Appreciate the importance of identifying goals and timetables

► See that email campaigning is an iterative process; you build your base and your audience over time
Email Campaigning Road Map

► Develop online goals and tactics
► Identify roles in your online campaign
► Develop a process for creating emails
► Design an email template
► Develop a delivery calendar
► Compose and send emails
► Assess response and impact
► Build and grow your list
Develop Online Goals & Tactics

► Examine the campaign and organizational goals of your group
  ▪ Base building
  ▪ Awareness raising
  ▪ Fundraising
  ▪ Advocacy
  ▪ Event mobilization and turnout
  ▪ Volunteer engagement
Develop Online Goals & Tactics

► Consider how email communications can supplement your tactics
  ▪ Example: your organization lobbies as a tactic
    ▪ Examine how email messages and other online tools can be coordinate constituent communication with representatives
    ▪ Track constituents' action
    ▪ Aggregate and grow total level of participation and impact
Develop Online Goals & Tactics

► If you use public mobilizations as a tactic
  ▪ Identify where and when email communication can be used to
    ▪ Increase turn out
    ▪ Coordinate logistics
    ▪ Increase media coverage
    ▪ Communicate outreach plans
    ▪ Increase co-sponsors
Develop Online Goals & Tactics

► Set a series of achievable goals with your online interactions
  ▪ Goals that you can track in relationship to your campaign and organizational goals.

► Online campaigning is about engaging your supporters in what your organization is doing
  ▪ If your online and offline goals are not synchronized you will not be successful.
Develop a Process

► Identify roles in your online campaign
► Develop a workflow and decision making process for sending out emails.
  ▪ Decide who in the organization has what authority to send to your list
  ▪ What review process needs to happen for each email that is sent?
Design an Email Template

► Work with a graphic designer
  ▪ Create a template that reflects
    ▪ organization “brand”
    ▪ campaign tone

► Design an email template and banner for the emails

► Design layouts for different types of emails
  ▪ Fundraising, Action alert, Newsletter
Develop a Delivery Calendar

► Make decisions on the frequency and type of content that you are going to send to your list(s).
  ▪ Look at your campaign calendar and goals
► Plan what actions and topics your emails are going to focus on over the upcoming months
  ▪ Priorities may change, especially in campaigns
► Decide how fundraising pitches integrate into campaign calendar
Develop a Delivery Calendar

- Create an expectation in your supporters for the frequency and content of messages.
- Set deadlines among your organization for when content is due for emails.
- Have a process for sending an emergency alert.
  - How fast could you get out a critical message?
Compose and Send Email

▶ Design and author using best practices
▶ Develop a personality and rapport with your supporters
  ▪ Carefully consider content and tone.
▶ Send emails out to your constituency
  ▪ Consider testing with a subset first
▶ Listen to feedback
  ▪ Monitor open rates and unsubscription rates
Build and Grow Your List

- Examine ways that you can grow your list.
  - Are there allies or campaigns with whom you can send joint emails or campaign with?
  - Find ways to get your supporters to forward your emails.
  - Sign up sheets at all “offline” events

- Actively consider the sign up process for emails on your website and print materials.
Section Summary

► Email campaigning is a process requiring planning

► Understand the road map before you begin

► Set goals and evaluate your progress
  ▪ Learn from each iteration

► Follow best practices for design and composition
End Of Section

► Questions?
► Comments?

Thank You!

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