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)
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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