

Web Advocacy Training for Campaigners

Online Campaign Design

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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 an Event
 - Building Community
 - Reaching and Educating Audiences
 - Raising Money
 - Building your Base
 - Engaging volunteers

Develop Online Goals & Tactics

- ▶ eAdvocacy tools are a means to building relationships with your base
- ▶ Online campaigning is about engaging your supporters in what your organization is doing
 - You need a plan to plug your base into your work
 - If your online and offline goals are not synchronized you will not be successful

Identify Online Audience(s)

- ▶ This **can** be easier or seem well defined, but don't presume to know your audience
- ▶ Differentiate between constituency and audience
 - Who are you advocating on behalf of?
 - Who are you trying to reach?
- ▶ Your traditional audiences/constituency and online audience may be very different

Identify Necessary Tools and Technologies

- ▶ Make sure they support your online goals
- ▶ Strive to keep tech footprint small
 - Simplicity is Power
- ▶ “Bleeding Edge” technology is not advisable
 - Exception: “Edge Tactics”
- ▶ Be aware of data integration issues
 - Data outlives technology every time

Core Tool Checklist

- ▶ **Content Management System**
 - Manage your web site
- ▶ **Constituent Relationship Manager**
 - Manage your supporters, allies and contacts
- ▶ **Email Delivery Tool**
 - Need to use a service for 'deliverability'
- ▶ **Online Action Platform**
- ▶ **Donation Processing**

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

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?

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?

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: campaigners need access to
 - Stakeholders
 - Content resources
 - Decision making authority

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

Develop Online Goals & Tactics

- ▶ Email is still the killer online tool
 - One you have an email address, you can push content
 - Don't need to rely on web traffic
 - All engagement should focus on address capture
- ▶ Email drives traffic to the other components of your online and offline strategies
 - Online actions, events, education, fundraising

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

End Of Section

- ▶ Questions?
- ▶ Comments?

Thank You!

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