Web Advocacy Training for Campaigners

eCampaigning Roadmap

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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
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
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
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”
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: campaigner 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
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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