

Tools for Digital Organizing—And How (Not) to Use Them

Feb 9th, 2016 josh@cstreet.ca shamus@newmode.net

ABOUT CSTREET

We want to win real, progressive change.

cStreet Campaigns is a digital agency focused on helping our clients use technology to engage and inspire their supporters to action.

Founded in 2012, cStreet specializes in digital campaigns powered by NationBuilder that include strategy, design, and web development for non-profits, higher education institutions, labour unions, and political candidates looking to revolutionize their digital presence.

ABOUT NEW/MODE

Empower. Influence. Win.

Started through award-winning civic engagement organization, OpenMedia, New/Mode is reimagining democratic engagement in the digital age.

We weren't satisfied with existing advocacy applications—so we've built the tools today's environmental and social equity campaigns need to empower their supporters, influence decision-makers and win.

Our aim is to power democratic participation wherever the open Internet exists.

Canroots 2017

Why We're Here

This workshop emphasizes that tactics must be rooted in strategy, by highlighting stories of proven tactics landing flat and flying high.

Laders of Engagement







Move people along a ladder of engagement (using NationBuilder paths)

Unaware: They've never heard of you! Observers: Seen an article or post or got an eblast Supporters People who have opted in by taking action Advocates People who have taken ownership





Ladders of Engagement meet Paths

- Can be organization-wide or specific to a campaign or project.
- Specify the steps that people go through in a project or campaign.
- Customizable and flexible based on your project.





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Moving people along paths

- Individuals can be on multiple paths.
- Paths are "step" based.
- They show all the different ways that a supporter/member is engaged.
- People can be batch updated to move en masse.



What are we moving our supporters towards

• To be able to establish the steps in a ladder of engagement we have to start by defining an end point for our supporters.

• For a political campaign, you might have one ladders for your Voter ID (what are the steps to converting people into YES voters?) and in an NGO campaign you might have a ladder for converting everyone on your email list into becoming advocates in a new campaign.









Unaware

When you're starting out, you want the largest possible segment.

For instance, if it's a new public-facing campaign then your "unaware" segment might be the general public.

In a campaign with a more limited scope, this segment might be your existing supporter base that you're introducing the campaign to.









Unaware

When you're starting out, you want the largest possible segment.

For instance, if it's a new petition-powered campaign then:

- All emailable
- In the geographic area of your campaign







Observers

People on this step are everyone who's aware of your project or campaign.

Possible database segments:

• Opened email

For campaigns folks, for instance, these might be people who opened the petition email but did not sign.







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Observers

People on this step are everyone who's aware of your project or campaign.

Possible database segments:

- Opened email
- Or
 - On ladder of engagement step 2

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Supporters

People on this step are everyone who has taken an action in support of the campaign.

Possible database segments:

- Petition Signers
- Endorses
- Story sharers

This is anyone who has taken your first significant action.









Supporters

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Possible database segments:

- Petition Signers
- Endorses
- Story sharers

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People on this step are your dream activists. This is where you want everyone to end.







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People on this step are your dream activists. This is where you want everyone to end.

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Choosing Your Targets and How to Reach Them

Power Mapping

- 1. Determine your target(s)
- 2. Map influencers
- 3. Connect relationships
- 4. Determine priority relationships
- 5. Build your campaign plan



Chancellor Coomb

Source: movetoamend.org/toolkit/guide-power-mapping





Emailing

- High conversion/low barrier actions to build support base
- Stay on the radar with decision-makers and influencers

KIDS COUNT: STOP THE HIKES ON SCHOOL-BASED CHILDCARE

Mayor Tory and Toronto City Council have proposed cutting the Childcare Occupancy Grant in the City's 2017 Budget.

If this grant is eliminated, over 60 percent of children and their families will be faced with an increase to their childcare fees (estimated at \$600 or more per year). But its impact could be even greater: the uncertainty and upheaval it will create in childcare centres could threaten their very viability.

First Name *	Last Name *
Email Address *	Postal Code *

We'll notify your representative

As one of your constituents, I am writing to ask you to maintain the Childcare Occupancy Grant in the City's 2017 Budget.

If this grant is eliminated, over 60 percent of children and their families will be faced with an increase to their childcare fees (estimated at \$600 or more per year). But its impact could be even greater: the uncertainty and upheaval it will create in childcare centres could threaten their very viability.

Already 75% of families in Toronto find childcare too expensive. This increase will only push that percentage higher.

Privacy Note:

Hosted by Social Planning Toronto and New/Mode Community Engagement. Learn how we protect your data here. Social Planning Toronto will keep you up to date.





Tweeting

- Generate public commitment from supporters
- Establish public presence across decision-makers' profiles
- Expand your campaign's network

Tweet your Senators - Vote NO on Betsy **DeVos for Secretary of HHS**

Betsy DeVos is unfit and unqualified for Secretary of education. We need an experienced Secretary of Education who wants to strengthen and improve all public schools. Betsy DeVos has never attended public school, did not send her children to public schools and has no experience with any of the challenges that public schools face. Further she wants to divert public money into private schools. Her personal financial investments in charter schools makes this a serious conflict of interest.

E-mail *	
Zip Code *	

Send a Tweet to your Senators

19 characters remaining

ar ar 10

Betsy DeVos must not become Sec. of Education.We must strengthen public education NOT destroy it.

Tweet







Calling

- Empower your leading activists
- Demonstrate your community's commitment to a cause
- Target influencers



TELL YOUR MP: RELEASE THE RESULTS!

Over 10,000 people have submitted feedback to the government's National Security Consultation – and we know the vast majority have called for an end to reckless mass surveillance.

But without public pressure, the consultation could end up being nothing more than an exercise in box-ticking. Let's remind the government that their actions must be guided by our feedback.

If we can get them to release the results of the consultation, there will be huge political pressure to act on them. Give your local MP a call now and ask them to tell Minister Goodale to release the results!

About the call:

Phone calls are hands down the best way to get your representative's attention. No matter who you speak with, it's important to deliver your message. If you're not able to speak with your MP directly, you can speak to their constituency assistant, or leave a voicemail.

PLEASE HAVE YOUR PHONE READY.

When you click the MAKE THE CALL button, the system will call your phone and patch you through. This is a local call that is connected to your phone as an incoming call. PLEASE HAVE YOUR PHONE READY.

First Name *	Last Name *	Phone Number *	Email Address *
	Post	al Code *	
	MAI	KE THE CALL	





Letters to Newspapers

- Empower and train your leading activists
- Multiply your earned media reach
- Publicly demonstrate local community support



Send a Letter to the Editor How Canada Post can be the hub of our Next Economy



SEND A LETTER TO THE EDITOR

As you read this, the government's task force is putting together a list of "viable options" for the future of Canada's postal service.

While Canada Post's Harper-appointed CEO, Deepak Chopra, pushes to cut services, we're proposing a different vision.

It's time to use our postal network to help build Canada's next economy, with postal banking, green infrastructure, and community services.

We all know that politicians read their local papers. Enter your postal code to publish a letter in your local newspaper now.

	Enter Your Postal Code *	
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Online to Offline

- Earned media opportunities
- Engage the top of the ladder
- Demonstrate commitment to your community





Targeting Tactics Gone Wrong

We the People... are about to get spammed in support of the TPP

Why Good Trade Deals Matter to a Business Like Mine:

MARCH 4, 2015 AT 7:18 PM ET BY TANYA SOMANADER

Summary: Nick Martin is the co-founder of The Pro's Closet, an online used-cycling business. He sent the following email to the White House list to highlight why a better trade deal means a brighter future for online businesses like his.

Nick Martin is the co-founder of The Pro's Closet, an online used-cycling business. He sent the following email to the White House list to highlight why a better trade deal means a brighter future for online businesses like his. Didn't get the email? Sign up for email updates <u>here</u>.



The Trans-Pacific Partnership isn't just President Obama's proposed trade deal -- it's mine, too. It's a trade deal that millions of other online small business owners in this country would be proud to add their name to. I want to tell you why:



Targeting tactics done right - Stop the Meter

- Stage 1: Petition and social actions targeting Minister
- Stage 2: Targeting influencers
- Stage 3: Secure opposition parties' consensus
- Stage 4: Secure new directive from government
- Stage 5: Target CRTC



I appreciate all the petitions I'm getting via Twitter re Usage Based Billing but I can't comment till the appeal period is up. Thx!

3 Nov via Twitterrific 2 Favorite 13 Retweet 1 Reply

Retweeted by jjuc5 and 6 others







- Think systematically about paths to influence key policy-makers
 - Think strategically about how to reach your targets
- Ensure supporters at different levels of the ladder can meaningfully engage
 - Capture, learn, and iterate from data

Key Lessons



Knowing Your Community



The Bully Project -Key Components

- -Distributed events and house parties
- -Prime time coverage of CNN
- -Gamified user experience to drive continuous engagement





Gamified & open Ladder of engagement

• Opened up the ladder of engagement so all supporters could see it and know how to move up

• Incentivized action by offering rewards (you'll see more in a minute)





Rewards? Wut kinda rewards?

Every time you took action you got a badge!

- Take the pledge to end bullying -> Get a badge!
- Download the educators' toolkit -> Get a badge!
- Recruit 3 friends -> Get a badge!
- Host or attend a screening -> Get a badge!
- Donate -> Get a badge!

...and your badges followed you around the site as you interacted to act as a pressure point to collect them all.



FILM TOOLS & RESOURCES DONATE







CHECK OUT THE REST OF THE BADGES YOU CAN GET









Cool, but did anyone do 17

At last count...

5,000+ Tweets sharing badges

50k+ Email Signups

500+ Distributed Events







But also, Olivia Chow for Mayor

With Olivia we used a similar approach

Our key digital + field actions lead to badges and a data-driven dashboard asked our supporters to take action based on previous activities.





OLIVIA

Sign up to be an organizing fellow 🧿

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12 M AF 2014 Volunteer profile: Mostafa Faghfoury

S MAR SOM More video evidence It's time for a new mayor

25 APRIL 2014 Reality check: 151 days of saying nothing

MORE CAMPAID

our city better for all of us." -OIM



With Olivia we used a similar approach

...to a different outcome.

Participation rates through the web were strong, but no one cared about the rewards.







What we learned from Chow & Bully

- Bully supporters *became* motivated by the film and sought out a way to get involved and we had the most obvious place to take action.
- Chow supporters started motivated and already knew what to expect.
- Borrowing tactics and applying in a different context can create pitfalls.










Listening & responding to your community



Turns out, many thought it was a joke.







5 principles of crowdsourced engagement:

- 1. Show malleability
- 2. Give recognition
- 3. Be accessible
- 4. Build relationships
- 5. Share ownership



Tactic 1: ongoing dialogue

Establish processes for discussing and integrating feedback.





bootsuite Social Media Dashboard

#



Tactic 2: comment threading

Use comments from your community in your content.

#CanadaReads: Some of our favourite tweets

This show may focus around five books and five panellists, but giving our audience a memorable experience is why we do this each year. And judging by many of your tweets, Canada Reads 2016 was one of the most memorable ever. Here is a round-up of some of our favourite tweets during show week.

Who knew a reality show about books could get so emotional?







Tactic 3: solicit thematic input

Solicit input through online channels, break it down into themes and use for new campaign content.

3737 Comments Speaking Up to

save the **colink**

Re: Regulatory environment for platforms, online intermediaries, data and cloud computing and the collaborative economy





Tactic 4: Quantitative & Qualitative Analysis

Define a problem statement, collect input, and apply analytical methodologies to identify solutions.



Typeform







Tactic 5: crowdsourced plans

Use all of the above to build policy proposals that put people front and centre.

Canada's Privacy Plan

A Crowdsourced Agenda for Tackling Canada's Privacy Deficit

media //





When people are heard

- 125,000+ action-takers
- Multiple private members bills
- Recommendations under consideration by government

Canada's Privacy Plan

A Crowdsourced Agenda for Tackling Canada's Privacy Deficit

media //





4 simple things you can do to improve your email program next week:

- Send more email by splitting lists based on interest and engagement
 - Make it (a little) harder to opt out
 - Bring old supporters back into the fold
 - Follow up with kicker emails



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Notes:

- Using issues-based data we can send email to only people who have taken action on a particular issue.
- Filtering allows us to group together supporters who have taken action in a huge volume of ways including:
 - If they've attended event 0
 - Where in our ladder of 0 engagement they are
 - What issues they're passionate 0 about
 - Other ways they've interacted with 0 US



Clinton Eblast:

- The unsubscribe link is in the fine print
- Blank space means unsubscribe isn't TOO obvious
- Supporters are offered the ability to receive less email
- Emotional appeal to not unsubscribe



UNSUBSCRIBE We're sad to see you go!

Grassroots mobilization is how we'll level the playing field against candidates with SuperPACs and wealthy donors. We hope you'll reconsider leaving, make a contribution to the campaign, or join us on social media at:



You can also **choose to receive fewer emails** — we'll only send you what we think are the most important messages from our campaign.



Bernie unsubscribe page

- Make an emotional appeal to not leave
- Offer alternatives to stay in touch through social
- Redirect people to donation pages





Custom Audience Targeting

Custom Targeted Ad

Range Rover Canada



Current Range Rover owners get steep discounts on financing new models.







I'm Cam Broten, and I'm running to be Premier of Saskatchewan.



Commit to Vote

👘 Like

Cam Broten and the New Democrats want to make Saskatchewan stronger. Stronger for middle class families. Fairer for people working hard to get ahead. And kinder to our children and our grandparents. Authorized by the Chief official agent for the...

HTTP://WWW.SASKNDP.CA/PLEDGE

Comment





SNDP – Bringing back unsubscribers

- Upload their email addresses to Facebook ads as a custom audience
- Develop ads that with a CTA that will help you re-acquire their email address
- Use landing pages to improve conversion





JAIN

Commit to vote READ OUR PLAN

~ EMAIL

✓ POSTAL CODE

SUBMIT



DONATE

SNDP – Advert Landing Pages

- Use a squeeze-style page
- Keep the call to action as clear as possible
- Previously engaged
 supporters have higher
 conversation rates

ar

FW: Before my father faces Hillary



donaldjtrump.com to me a

Friend,

Did you see Eric Trump's email?

I'm going to print the list of supporters for Donald Trump at 8:50 PM EST. This is your last chance to get on the list of supporters before Mr. Trump takes the stage.

Contribute now to get your name on the list.

Brad Parscale Digital Director Team Trump

----- Forwarded message ------From: Eric Trump Date: Mon, Sep 26, 2016 at 7:02 PM Subject: Before my father takes the stage To: joshstuart1@gmail.com

Friend,

Before my father takes the stage to face Hillary Clinton, I'll be giving him a list of supporters who made a contribution just before the big debate.

I want to remind him just how many people are invested in this movement. I want to remind him why he signed up for this fight.

26 Sep 🚦

Notes – Kicker Emails

- Target only non-opens or non-action takers
- Keep it short
- Repeat your call to action
- Personalize the subject line



Tools for Digital Organizing—And How (Not) to Use Them

Feb 9th, 2016 josh@cstreet.ca shamus@newmode.net