

Campaign Training

Data and CRM Basics

www.LPCaucus.org

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Voter Data



What kind of data? (1 of 2)

- People
 - Name
 - Political Party
 - Demographics
 - Recruited by?
 - Point person?
- Contact Information
 - Address
 - Email
 - Phone Number
- Support Level
 - Voter
 - Volunteer
 - Party-affiliated

What kind of data? (2 of 2)

- Contact History
 - What kind of outreach have we done to them?
 - Door knocked?
 - Phone called?
 - Emailed?
- Donation History
 - How much have they given, and when?
 - Potential for Donation Asks
 - When were they last thanked?
- Voting History
 - Do they vote?
- Tags
 - Easy to search for same-issue, such as tagging with marijuana, guns, lgbt, etc.
- Notes

How do you get that data?

- Voter registration lists from state/local registrars
- Political Party
- Affiliated organizations (PACs, caucuses, etc.)
- Community Groups you belong to
 - Churches or Religious Organizations?
 - Gun Clubs?
 - Issue advocacy groups?

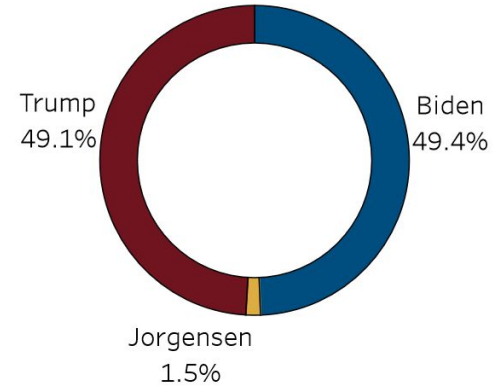
Note: This data can be considered an in-kind contribution, so check the rules for your area to ensure you report it appropriately.

Most Important Voter Data for Elections

Data	Reason
Name	Should be pretty obvious!
Voter Registration Address	Make sure they are in your district! For door knocking / mailers / events.
Political Party	Target marketing, inferred support level
Support Level	Determined from interactions with the voter / customer.
Email	Lets you email them - good for inexpensive, targeted voter outreach.
Phone Number	Lets you call them - good for expensive, targeted voter outreach.

Election Data

President Results



Types of Ballots Cast

President - All Candidates



Lincoln 4-step

The Lincoln 4-step is a simple method to winning elections:

1. Obtain a list of all the voters in the district.
2. Split them into categories: Supporters, Persuadables, Non-supporters.
3. Convince the Persuadables to vote for you (use the people who are most likely to convince them).
4. On election day, make sure every Supporter goes to the polls.

Win Number

- How many voters typically vote in this election?
- How many votes does it take to win? (usually 50%+1, but not always!)
- How many candidates are likely to be running against you? (2-way, 3-way, n-way race?)

https://www.lpcaucus.org/practical_guides

CRM



What is a CRM?

Customer Relations Manager

1. Easy to use interface,
2. to a database of people,
3. in your market.

Qualities

- Manages interactions with customers (voters)
 - Will often let you email, send messages on social media, call, or create mailing lists.
- Database of customers
- History of customers

What are some good examples of CRMs?

- Nationbuilder
 - **Pros:** Inexpensive, out-of-the-box
 - **Cons:** Limited on what it can do, tiered pricing model gets expensive for big campaigns.
- CiviCRM
 - **Pros:** Open Source, Flexible, Free
 - **Cons:** A lot of IT Knowledge to get going, can become a time sink. Requires a lot of customization.
- Salesforce
 - **Pros:** This has every feature you could ever want.
 - **Cons:** Pricey!

What are the basic components?

1. Database of People, including all interactions and data.
2. Ways to communicate with people through the CRM (email, social media, phone calls, mailers, etc.).
3. Secure Website (can be used to take donations).

Should you build your own CRM?

No.

Seriously, don't do it. I've seen campaign after campaign sink all of its valuable time into building a CRM and then get slaughtered on election night.

COTS (commercial, off-the-shelf) solutions have huge benefits:

- Scaleable
- Technical/Customer support
- Ready immediately

Questions?

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