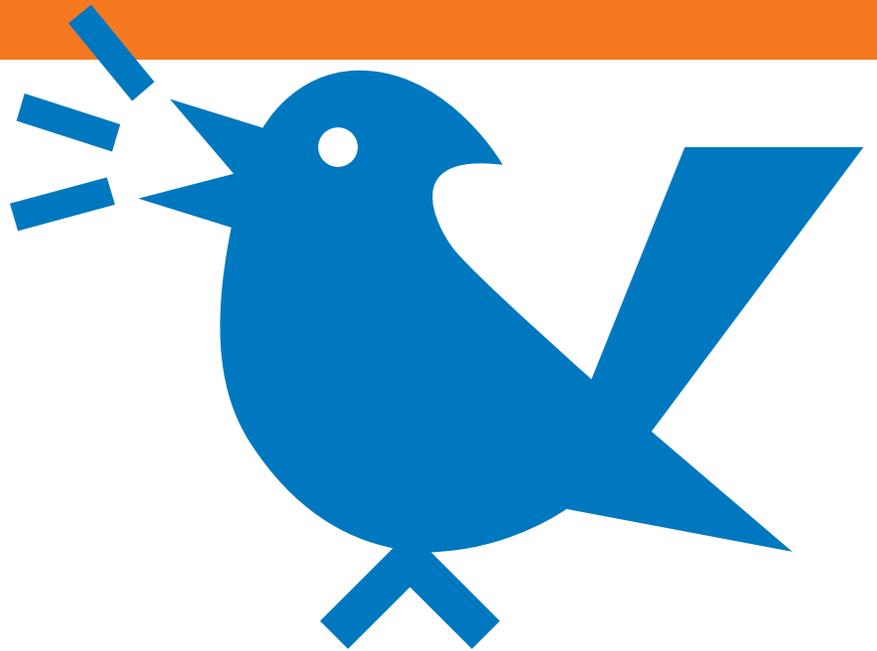


The Obama Playbook

How digital marketing & social media won the election



SPECIAL REPORT

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I. INTRODUCTION: TAPPING INTO THE HEART OF A CAMPAIGN



On Nov. 5, 2008, with the voting results in and snapshots of the newly elected 44th President of the United States emblazoned on newspaper front pages coast to coast, many Americans experienced a deep sense of pride. They not only witnessed history in the making, but they played a personal role in a movement unlike any other in American politics.

Heeding the mantra of “Yes, we can” and roused by the need for “change,” these people used their own words, leveraged their personal networks of family and friends, and accomplished the unexpected. They propelled a long-shot senator out of the shadows and into a towering victory over an American war hero.

Galvanizing the throng of active crusaders was the *Obama for America* campaign, a lean team of dedicated staff who expertly wielded the new digital tools at their disposal to convert everyday supporters into zealous advocates.

“The Obama campaign did naturally what every good marketer should do in this new economy,” wrote Jalali Hartman, Yovia.com CEO, in his paper ‘Obamanomics.’ “Rather than focusing on ‘acquisition’ as most marketers tend to do, the campaign had a three-pronged approach,” which included acquisition, activation and advocacy. “The campaign was not successful simply because it got a lot of people out to vote. It was successful because it got a lot of people out getting others to vote.”

The *Obama for America* campaign achieved that feat through its adherence to game-changing strategies.

First, it molded campaign messaging around the people, not just the man, emphasizing both individual and community visions for change. “The campaign was less about policy, and more about ‘hope’ and ‘change,’ terms that people could, and did, interpret in their own personal ways,” Hartman explained. “Most importantly, the campaign became as much about the individual power to make change as it was about Barack Obama becoming president ... Barack Obama’s power came from encouraging people to make the story their own.”

Next, the campaign provided the American people with transparency and up-to-date information that helped to develop a bond of trust and gave people the power to make informed decisions. Furthermore, that information was disseminated across numerous digital and social media platforms so that no matter a user’s preference, that information was readily accessible.

The campaign also offered supporters every opportunity to get involved, and candidly asked for it, whether that meant volunteering time, making mon-

“Obama did not create a community, he enabled volunteers to create their own,” Hartman wrote. “This policy of openness and access proved to be effective and extremely viral.”

etary contributions, calling friends in battleground states, or just sporting campaign T-shirts.

Moreover, the campaign encouraged supporters to develop their own active campaigns and provided them with a collection of tools for getting started. From descriptive how-to's to unrestricted permissions to share, post, and repurpose any and all campaign content as desired, *Obama for America* let the people of the United States determine both the appropriate message and how it should be propagated.

“Obama did not create a community, he enabled volunteers to create their own,” Hartman wrote. “This policy of openness and access proved to be effective and extremely viral.”

All of this could not have been so successfully executed had the country not already embraced the digital age to the extent that it has. According to Nielsen/NetRatings and the U.S. Census Bureau, the United States has an Internet usage household penetration rate of 72.5 percent, and a population of users totaling 220 million. Of course, most users are not surfing the Web confined in their own Internet bubbles; they're connecting with other users like never before and have become capable of sharing mass quantities of information with minimal effort.

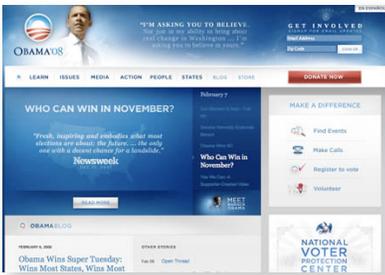
This special report examines how the campaign leveraged connections through the vast and evolving world of digital media, social media and mobile marketing to develop a thriving force of passionate individuals who took political campaigning to new heights. The report also includes lessons learned and a special section on how businesses can attempt to mobilize their customers into a volunteer salesforce, much like Obama did.

II. LEVERAGING THE POWER OF DIGITAL MARKETING & SOCIAL MEDIA

The Obama campaign pulled off what experts are calling perhaps the most successful and innovative digital marketing and social media campaign ever attempted on a mass scale. Backed by great messaging and with near surgical precision, the Obama campaign successfully leveraged every major outlet and platform to spread its message and get voters involved. This included everything from sophisticated campaign Web sites and email marketing to file-sharing sites and social networks. The end results were spectacular: more than 13 million email addresses, hundreds of millions of dollars raised, and a historic election victory. This section analyzes what the campaign did across Web marketing, social media and streaming video.

Web Marketing

BarackObama.com



The campaign's main Web site was established at BarackObama.com, with related sites for each state (e.g., ca.barackobama.com for California and ny.barackobama.com for New York), and a community portal at My.BarackObama.com. Customized Spanish-language and closed-caption sites were also created.

Content for each site aimed to build a connection between voters and Barack Obama, Michelle Obama and Joe and Jill Biden, with biographical information and a regularly updated blog that helped make them personable and relatable. Users could also access speech transcripts, press releases, and facts pertaining to assertions made on both sides. There was a wealth of information related to special issues and select groups, including women, seniors, Americans with disabilities, military families, environmentalists, and even Republicans.

But these sites were not simply created as promotional collateral or encyclopedias of campaign information. Instead, the sites were designed to serve as a comprehensive resource for helping users become active campaigners. They clearly urged users to find local events, contact undecided voters, and share their individual stories. A quote from Obama in the header of each page gave users a personal message: "I'm asking you to believe. Not just in my ability to bring about real change in Washington ... I'm asking you to believe in yours."

"A supporter on My.BarackObama.com could create a personal webpage in order to host events (that were then searchable), send invitations to other supporters, upload photos, keep a personal blog, and access data bases of phone numbers for doing phone banking from his or her own living room," Hartman explained.

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Videos and documents, such as Obama's "Blueprint for Change," could be easily emailed to friends, downloaded, linked to, or embedded with available code.

"Providing these tools empowered people to do it themselves, and it was also very inexpensive."

Additional tools were offered to assist users in establishing their own communities, campaign sites, and promotions elsewhere. For example, there were downloadable logos, taglines, site badges and widgets, chat buddy icons, posters, signs, and flyers. Videos and documents, such as Obama's "Blueprint for Change," could be easily emailed to friends, downloaded, linked to, or embedded with available code.

Later, a "Neighbor to Neighbor" feature was added to provide users with lists of residents on their own blocks whom the campaign wished to contact, thus enabling the campaign to reach these voters through personal contact with someone already possessing a community bond.

"My.BarackObama.com offered a database of guidelines and how-to's—how to plan a voter registration drive, how to host a debate party, how to knock on doors, how to make phone calls for Obama, and more," Hartman explained. "Supporters were given access to databases of phone numbers and emails of other supporters, and local Obama events were posted on maps and searchable by ZIP code. These tools enabled everyday people to become community organizers in their own neighborhoods."

Other campaign elements—which served as additional user tools—were also featured on the sites, including links to all Facebook, MySpace, YouTube, and many more. The sites also prompted users to sign up for the campaign's mobile communications—a key and award-winning aspect detailed later in this report.

Business Lessons Learned:

- Provide simple, clear, concise messaging that resonates with customers.
- Use your Web site and newsroom as a hub that links to other social media elements.
- Empower your existing brand advocates to share both their stories and yours through social media software vendors, such as Pluck or Zuberance.

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Email Marketing



Email is such a part of our daily lives that it's not unusual for people to forget how powerful a medium it can be. The Obama campaign, however, didn't forget. Little known fact: Obama's email marketing efforts generated the lion's share of campaign fund-raising, according to Stephen Geer, Obama's national email director.

Geer and his team sent literally billions of email communications over the course of the campaign and wound up with an astonishing 13 million email addresses by Election Day. On any given day, the campaign would send out more than 100 different email versions, segmented by demographics, geography, fundraising history, and dozens of other key attributes.

Geer attributes his success to building the list early, detailed segmentation, and the use of split testing. His staff relentlessly tested each element of every major email push, from subject line to creative to copy.

Another important factor is something many marketers know about but often miss: *having a very clear and distinct call to action in every email*. Whether it was donating \$5, sharing a video, or signing up to volunteer, each email was carefully tailored to get a response. "I'd be hard-pressed to find a single message that didn't have some type of action to follow," Geer said.

Email also played an important role in two areas critical to any political campaign: messaging and mobilization.

Messaging: During the campaign, Geer worked with Obama Campaign Manager David Plouffe to deliver frank assessments of important campaign events, such as primary results, debate outcomes and major poll announcements. These short emails, which later included videos, cut through the typical spin of most campaigns to give a real sense of what was going on in the campaign. Geer believes the emails were key in building true relationships with supporters.

Obama also used email to quickly pivot and respond to campaign issues. For example, when Sarah Palin seemed to mock Obama's experience as a community organizer in her acceptance speech as vice president, Obama's campaign pounced. They sent out an email essentially asserting that Palin not only attacked Obama, but attacked supporters who felt they owned a piece of the campaign. The result of the email and the tactic: \$11 million raised, the largest single day of fund-raising in American politics, Geer said.

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Mobilization: Very early in the campaign, whenever Obama campaign organizers arrived in a state, district or city, they were given a gift—lots of email addresses, which provided a turbo-boost in organizing local support. And these weren't just any emails, but people who had identified themselves as wanting to volunteer for the campaign. Organizers were able to start immediately. It was a huge benefit to the campaign, and according to Geer, one of the key reasons for the election victory.

Business Lessons Learned:

- Put a clear call to action in every email or newsletter you send.
- Use segmentation to personalize your emails as much as possible.
- Use split-testing and analytics tools to measure important email components, including subject line, creative, call to action, etc.

Online Advertising & Search Engine Marketing



Fish where the fish are. Be timely, and be relevant. Those were the tenets of Obama's online marketing efforts, which were run by Andrew Bleeker, the campaign's director of online advertising. They worked to perfection, helping raise an estimated \$20 million, deflecting political attacks, and getting millions of voters mobilized.

Working in tandem with Geer, Bleeker's team also focused its efforts on three key areas: fundraising, messaging and mobilization. Their primary tools: online display advertising and search engine marketing (paid keywords), sprinkled with in-game video advertising.

Bleeker's team helped build Geer's email marketing list through its online marketing efforts. They also helped directly raise funds and mobilize voters by following an old axiom: Fish where the fish are. Bleeker routinely targeted different Web sites and portals where important demographics could be found, especially in key battleground states.

The team also tried to be relevant and timely, swapping banners and buying keywords based on hot topics or events, including each debate or primary, and, of course, the national election. For example, before each primary, Bleeker ran geo-targeted ads that counted down the days until voting—three days, two days, one day, vote today! Bleeker frequently 'day parted' his ads, running display

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If you happened to be playing Xbox Live during the election, you may have seen Obama ads as you were zipping your racecar around the track or shooting a virtual three pointer in basketball.

and search engine ads between 9 a.m. and noon in local markets to encourage people to get out and vote at lunchtime.

“Online advertising is very adaptable and very fast,” Bleeker said. “To have maximum reach, you need to follow the news, Google trends, and determine which traffic is right for you. For instance, if a news story was to break or something was to come up in a debate, we would need to decide instantly if that (keyword) term was worth advertising on or risk missing the bounce.”

Bleeker also focused on very specific calls to action (e.g., sign this petition, vote today, get a free bumper stick, read this white paper) and relentlessly tested his creatives to maximum conversions.

He also used online advertising to help with messaging. For example, when McCain began criticizing Obama for planning to raise taxes, Bleeker’s team responded with display ads that enabled people to calculate their tax savings right within the ad itself. They also ran targeted keywords that linked to a microsite, <http://taxcut.barackobama.com/>. It proved extremely effective in countering a main line of attack from the opponent.

In addition to online marketing, Bleeker also experimented with in-game video advertising. If you happened to be playing Xbox Live during the election, you may have seen Obama ads as you were zipping your racecar around the track or shooting a virtual three pointer in basketball. Bleeker advertised in about 16 online video games through Microsoft. Although the ads were not interactive, they were geographically targeted and useful in mobilizing younger voters, Bleeker said.

Business Lessons Learned:

- Keep it fresh—don’t stick with the same online campaign elements.
- Always think about your online advertising from your customers’ perspective. How do they benefit and why should they care?
- Fish where the fish are. Find out where your customers and also follow the trends. Buy keywords based on hot topics and trends.

Streaming Video



Ustream.tv

Until recent years, streaming video coverage was a costly endeavor requiring a satellite truck and full videography crew. That changed with the introduction of Mountain View, CA-based Ustream.tv. Political candidates in this race, Obama included, quickly took note.

Established as a means for overseas soldiers to connect with their families back home, Ustream.tv technology provided a live video broadcast platform for the *Obama for America* campaign that simply required a videographer with a mobile, landline or WI-FI Internet connection. The result was live streaming coverage of every campaign speech, debate, and event.

Each live streaming feed was immediately available on Ustream.tv with interactive tools, such as real-time chat. Viewers also could leave comments; share information with friends via email; post on Digg, Facebook, Twitter, and StumbleUpon (or elsewhere, using embeddable code); and find related videos.

According to Ustream reporting metrics, close to 5 million unique users logged a combined sum of almost a million hours over the course of the campaign watching Obama's videos on Ustream.tv.

The *Obama for America* campaign was not the only political campaign to leverage Ustream. In fact, candidates from the primaries to the presidential race, including Clinton, Dodd, Edwards, Huckabee, Kucinich, McCain, and Romney, incorporated Ustream into their marketing approach.

What made the Obama campaign more effective, however, was:

- **Consistency:** Obama's campaign predictably streamed every campaign event and every public speech (including Michelle Obama's, and Joe Biden's once he joined the ticket), which helped to keep the Democratic base rallied and gave it consistent access to any event.
- **Widespread online promotion:** A multitier strategy was used to publicize and build awareness for each new video being shown on the Ustream site. Recorded clips were edited and posted to YouTube within hours. The blogosphere was alerted ahead of time, then provided with embeddable feeds in a massive distribution that resulted in more than 22 million posts to independent Web sites and blogs. Tweets with links were immediately posted to campaign and Ustream Twitter accounts.

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“The two campaigns that were the most organized from the technical perspective and the new media sides were Obama and McCain,” said Brad Hunstable, president and cofounder of Ustream.tv. “And those were the ones that won [the primaries].”

Business Lessons Learned:

- Consider Ustream.tv for live events, such as customer conferences or other broadcasts for your customers or prospects.
- Be consistent in your use of live video events. Find out how to do it and commit to it for the long term.
- Promote clips to YouTube and other video platforms to increase visibility and add content to the Web.

Social Networks

In his Nov. 9, 2008 *New York Times* article, David Carr describes how Obama solicited the advice of Netscape founder and Facebook board member Marc Andreessen in Feb. 2007 about how he could incorporate the growing phenomenon of social networking into his campaign.

“He wondered if social networking, with its tremendous communication capabilities and aggressive database development, might help him beat the overwhelming odds facing him,” Carr wrote.

Andreessen’s suggestion: Tap into existing systems. And tap his campaign did, into more than 200 social sites, said Scott Goodstein, external online director for *Obama for America*. One of the first was Yahoo Answers, which Obama used to directly respond to public inquiries. Others included the following.

MySpace

Fifty-seven MySpace profiles were set up to include not only Barack Obama’s main profile (which garnered more than one million friends, compared with McCain’s 200,000+), but also one for each state (e.g., “Oregon for Obama”) and various special-interest groups, including Women for Obama (12,100+ friends), Students for Obama (10,000+ friends), Obama Pride (7,600+ friends), African Americans for Obama (4,600+ friends), and many more.



Where the campaign left off, everyday users picked up, creating their own campaign-promoting profiles.

“The main MySpace profile had over one million friends, and we asked ourselves, ‘How do you send a message to tell people in Cleveland to organize without upsetting people outside of Cleveland?’” Goodstein said. “So we divided it up and created 57 separate faith-based and issue-based MySpace pages, and built an army to manage those.”

Each profile included general and group-specific blog posts, videos (with direct YouTube URLs and embeddable code to copy and paste), embeddable code for campaign images, and links to donate or organize on BarackObama.com. The profiles also featured promotions for Obama’s mobile campaign and links to other campaign platforms, such as Twitter, Facebook, LinkedIn, iTunes and more.

The campaign also set up a dedicated video channel on MySpace Video, with 15 videos. Users could add any posted video to their profiles, blogs or bulletins, or email them to friends. Some 720 users subscribed to the channel, which received 480,000+ video plays, compared with McCain’s MySpace video channel, which garnered 104 subscribers and had 67,000+ total plays.

“The amount of videos viewed and forwarded on was enormous,” Goodstein said.

Where the campaign left off, everyday users picked up, creating their own campaign-promoting profiles such as “Social Workers for Obama,” “1 Million Strong for Obama,” “Dead Heads for Obama,” “DJs for Obama,” “Mamas for Obama,” and “Sacramento for Obama.” Some even created their own MySpace videos (such as one titled “Obama for the World”) that other users could then add to their personal profiles.

Business Lessons Learned:

- Leverage MySpace.com if it makes sense for your business, especially entertainment-related businesses.
- Don’t make your MySpace.com page a direct copy of your site. Pivot around a certain campaign or cause.
- Make your page interactive. Integrate and reference other social media elements.

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Facebook users also created groups against McCain and Palin, such as, “I Have More Foreign Policy Experience Than Sarah Palin” (251,410 members) and “1,000,000 Strong Against Sarah Palin” (209,673 members).

Facebook

Along with Barack and Michelle Obama profile pages that were updated daily, the campaign established numerous groups on Facebook for every state and special interest group, just as it did on MySpace. In addition, groups were established for Michelle Obama (228,750 supporters), Joe Biden (180,200+ supporters), and the “Obama Action Wire” (52,700+ supporters).

The Facebook groups tended to be larger than those of MySpace. The main Barack Obama group generated more than three million supporters. For example, the “Students for Barack Obama” group had 225,400+ members; “Women for Obama,” 77,000+ members; “Obama Pride,” 23,200+ members; “First Americans for Obama,” 2,200+ members; “Latinos for Obama,” 10,000+ members; and “African Americans for Obama,” 10,600+ members.

Sharable photos, videos, and notes (similar to a small blog post) were available on every page, along with events for which supporters could RSVP. Any new posts were automatically announced to all group supporters. “Obama could post messages on Facebook groups that would instantly reach over a million supporters, fans who would then email the news to other friends,” Hartman explained.

Just as had been done on MySpace, individual users not only supported the campaign’s groups but also created their own.

“It’s hard to overstate the power that Facebook had in this election,” Hartman explained. “A single supporter-initiated group, ‘One Million Strong for Obama,’ had 920,502 ... members. This group had over four times as many members as a similar ‘official’ group started by the McCain campaign called ‘One Million Strong for McCain/Palin ‘08’ (216,711 members).”

Facebook users also created groups against McCain and Palin, such as, “I Have More Foreign Policy Experience Than Sarah Palin” (251,410 members) and “1,000,000 Strong Against Sarah Palin” (209,673 members). They were also wildly popular and passed from friend to friend, Hartman noted.

In addition, the Obama campaign participated in Q&A forums on the site and created its own Facebook application. The application urged users to show their support by adding the application box (which featured links to campaign stories and videos) to their profiles, “friending” Barack Obama, and joining related groups. Perhaps more importantly, the forum helped users find their local Obama Groups and encouraged them to get involved, such as by making calls or messaging their friends in battleground states.

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“It was one of the first applications that allowed people to contact and sort friends by battleground states,” Goodstein said. He added that this allowed for “third-party affirmations of the candidate in very personal messages sent on a one-to-one basis.”

Independent supporters also launched applications, such as the “Obama ‘08” application, which allowed users to send Obama-themed virtual gifts to their Facebook friends.

Business Lessons Learned:

- Consider setting up a Facebook fan page for your business and start with getting your employees involved.
- Provide plenty of content and updates, and encourage your customers to get involved, including uploading content and photos.
- Consider a cause-related Facebook page or application that gets users engaged and prompts them to recruit other friends.



LinkedIn

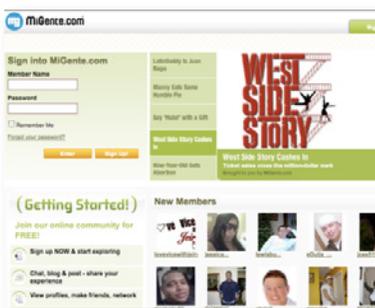
The campaign also aimed to connect with business professionals by using LinkedIn’s groups and answer section. There, campaign staff and supporters could answer specific questions and respond to related discussions initiated by the site’s users.

“Because the LinkedIn network includes a lot of small-business experts, it was a great place to get feedback on the campaign and the campaign’s proposals,” Goodstein said.

Specialty Social Networks

The *Obama for America* campaign also reached out to distinct demographics through networking sites that specifically serve those groups, such as BlackPlanet.com, AsianAve.com, MiGente.com, Eons.com (for baby boomers), Disaboom.com (for Americans with disabilities), and Faithbase.com.

Another specialty site leveraged by the campaign to inform users of current and upcoming campaign events was Eventful.com. It offers users the ability to search for events within a given radius distance.



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The campaign took the time to figure out the needs and expectations of each channel individually, so it could assure the right user experiences and maximize results.

Goodstein, who specializes in lifestyle marketing and online organizing, noted that the keys to success in this portion of the campaign largely revolved around the following:

Providing each audience with the right experience: The campaign took the time to figure out the needs and expectations of each channel individually, so it could assure the right user experiences and maximize results. For example, it found that MySpace users like to forward videos to their friends and then the campaign established a video channel on the site. And on Facebook, where users keep up with the latest on their friends through news feed posts, the campaign chose to strategically leverage that messaging system rather than inundate its group pages with national broadcast messages.

In some instances, such as with special-interest groups and sites, the campaign was able to fortify its connection with a select group by offering issue-specific or localized content that matched user interests, such as with an “I am a military wife” blog post on the “Veterans & Military Families for Obama” MySpace page, or a “Now or never in Rhode Island” post on the “Rhode Island for Obama” profile.

Ensuring consistent information: Campaign staff and volunteers made sure that the information posted was up to date and accurate on all platforms. Also, user messages and questions were answered in a timely fashion, and answers were in line with campaign messaging, and in the format received (e.g., with an email if the request came through LinkedIn’s email capability).

Tying it all together: The campaign also used cross-promotions to make users of one channel aware of the other resources. For example, Facebook pages contained links to all other campaign Facebook pages, as well as the Obama YouTube channel and Obama’s main MySpace profile page. MySpace profiles promoted BarackObama.com and Obama Mobile, and invited users to follow Obama on Twitter. Plus, it offered links to the campaign’s YouTube, Facebook, LinkedIn and Flickr accounts. The main blog on My.BarackObama.com was used to mention and link readers to alternate campaign channels, such as Twitter.

Carr said, “Like a lot of Web innovators, the Obama campaign did not invent anything completely new. Instead, by bolting together social-networking applications under the banner of a movement, they created an unforeseen force to raise money, organize locally, fight smear campaigns, and get out the vote that helped them topple the Clinton machine and then John McCain and the Republicans.”

Business Lessons Learned:

- Don't just jump into social media. Understand your business goals first and develop a strategy.
- Don't jump into every social network or specialty site. Take the time to understand which ones make sense for your business. A partnership with Eons.com or MiGente.com may or may not make sense.
- Be sure to tie your social media elements together and reference them on each network or site.

Online File-Sharing Sites

YouTube



The campaign established an Obama YouTube channel and added just shy of 1,800 videos during the campaign (although more have been added since), compared with McCain's 329. The channel attracted 114,500+ subscribers, compared to 28,400 for McCain, and some 18.4 million channel views.

"The official Obama channel was consistently ranked one of the most viewed channels on YouTube, and thousands of supporters created millions of unaffiliated user videos that still circulate today," Hartman wrote.

The Web site listed on the channel also linked users to a page on BarackObama.com that included a video message from Obama. In it, he welcomed users to the official campaign Web site and encouraged them to get involved. Plus, it had a form for receiving campaign communications, such as information on volunteer opportunities.

Business Lessons Learned:

- Videos are a great source of Web content for engaging potential customers and prospects. They are also good for search engine optimization.
- If you have existing video, create your own YouTube channel and properly tag each video so they come up in relevant search results.
- Consider starting your own video contest and upload the winning entries to your channel, or outsource your contest to a third-party firm.

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Flickr



Photos of the presidential candidate and campaign events were uploaded to the popular photo-sharing site, Flickr. Campaign volunteers and supporters also got involved, uploading hundreds of thousands of photos that offered candid views into campaign events and a creative show of support.

Business Lessons Learned:

- Use Flickr as an extension of your Web site, whether for product pictures for a press kit or customer contest entries.
- Don't be too promotional in your product captions. Focus on the product, not on the sales pitch.
- Share your photos within appropriate groups on Flickr.

Scribd



Scribd was another file-sharing site the campaign used to offer supporters access to full documents, such as policy papers and Obama's "Blueprint for Change." In addition to reading documents posted on the site, supporters could easily attain a URL for each document to copy and paste as desired, or the code for embedding the document into their own blogs.

Users also had the option of submitting the document on Digg, Reddit, StumbleUpon, and Delicious; downloading it in PDF and plain text formats; and emailing it on to friends, with the ability to import addresses from major Web-based mail accounts.

iTunes

Videos of more than 40 speeches, podcasts and endorsements—covering everything from Obama's views on healthcare, global warming, and education to more personal topics, such as fatherhood—were available for free download.

Micro-blogging

Twitter



The campaign, which began using Twitter in April 2007, blasted links of new videos and media interviews to followers; updated supporters on campaign news and Obama's progress on the campaign trail; and alerted supporters to upcoming rallies and appearances on news shows.

As the election neared, tweets were posted almost daily (sometimes several times a day) to keep the campaign top of mind. At last count, @barackobama had nearly 628,000 followers, just behind Britney Spears with 630,000 and CNN Breaking News with the highest of any Twitter account at 717,000.

Business Lessons Learned:

- Consider setting up a corporate Twitter account to engage brand advocates, influencers, media and prospects.
- Don't set up a Twitter account unless you can commit resources to providing regular updating and creating a dialogue with users.
- Encourage employees to set up Twitter feeds and leverage your network to engage advocates and distribute content.

III. MOBILE MARKETING: AN AWARD-WINNING CAMPAIGN



Despite Obama's wild success with digital marketing and social media, it was perhaps his award-winning mobile marketing campaigns that garnered the most attention.

"Without a doubt, the mantra that everyone is saying is that no U.S. president will ever be elected again without a mobile component to their campaign," said Mike Wehrs, president of the New York-based Mobile Marketing Association, which represents more than 700 mobile marketing vendors. "The ability to mobilize your supporters and get out your message and call to action at such a grassroots level is so powerful."

Obama's mobile communications strategy was recently honored with the 2008 Golden Dot Award for Best Mobile/Text Messaging Campaign.

According to Goodstein, mobile was selected to be a key part of the campaign strategy due to its burgeoning popularity, especially among young adults.

"Mobile phones are the only devices that stay with people 18 to 24 hours a day," Goodstein said. "More than 80 percent of people have a mobile device according to the cellular communications industry—that is critical mass."

Distributive Networks, which powered the bulk of the campaign's mobile efforts, said the mobile-messaging channel is unique because of its interactivity (allowing for two-way communication and instant gratification), its immediacy (most incoming messages are read within 15 minutes of receipt), and its impact.

"Mobile communications spur recipients to act, whether to purchase a product, make a donation, attend an event, share information with a friend, or any other call to action," states the company's "Txt We Can" report. "Text-message reminders have been found to increase the likelihood of an individual voting by 4.2 percentage points.

"It ended up being a great tool for organizing and an extremely effective mechanism for getting out the vote," said Kevin Bertram, CEO for DC-based Distributive Networks.

At the core of Obama's mobile initiative was an extensive texting campaign that used a dedicated short code (i.e., 62262, which spells out "Obama") in combination with more than 50,000 unique keywords (e.g., text HOPE to 62262). This was crucial for the following reasons:

- By owning the short code, the campaign was able to better control its messaging and avoid any mix-ups. (Distributive Networks' "Txt We Can" brief

Such targeting further ensured a positive and engaging user experience by enabling the campaign to quickly respond back to texters, often using automated systems, with tailored information that matched their interests or requests.

describes how the Clinton campaign used a shared short code that at the time was also being used by a health-clinic locating service).

- This arrangement also enabled the *Obama for America* campaign to initiate an unlimited number of keywords used to micro-target and monitor supporter interests and demographics (e.g., using “JOBS” or “IRAQ” to signify which policies were important to recipients; “PLEDGE” and “VOL” to determine whether they were open to getting involved; and state codes such as “OH” and “FL” to pinpoint their locality).
- Such targeting further ensured a positive and engaging user experience by enabling the campaign to quickly respond back to texters, often using automated systems, with tailored information that matched their interests or requests.
- By collecting this information, the campaign was able to develop detailed supporter profiles, and it took every opportunity to further build out those profiles by asking for additional information (e.g., “reply with your ZIP code”) or offering incentives such as special-event invites or campaign gear. This information provided valuable insight, but also helped the campaign to ensure that it continued to send only messages of interest and did not bombard all supporters with content that might be appreciated only by a select group, such as for a localized event.

Message frequency was an important consideration in the texting campaign because users typically must pay a fee to send and receive messages. The campaign therefore did not want to send too many messages, which might annoy supporters and lead them to opt out. It was also careful to maximize the information included in each message. At the same time, the campaign was conscious of not under-messaging and missing the opportunity to keep supporters energized through to the end. Users therefore received five to 20 messages a month, “depending on the depth of their involvement and the stage of the campaign,” according to Distributive Networks.

Another key aspect that differentiated Obama Mobile from other campaign elements was the Mobile Marketing Association (MMA) stipulation that prohibits marketers from making first contact or sending messages without an explicit “opt in” from the end user. To the campaign’s advantage, this meant that those who did opt-in were consciously choosing to participate and were therefore more likely to remain active in the campaign. However, it also meant that the database had to be built from the ground up.

The campaign promoted that it would make the first announcement of Obama's running mate via text message and encouraged supporters to opt in ahead of time to become privy to this information before it hit the press.

Obama Mobile was able to grow its opt-in list—achieving an estimated 2.9 million numbers in its database by the time the VP announcement was made in August 2008, according to Nielsen Mobile—by using:

- **Integrated marketing:** The dedicated short code and its related keywords were featured on everything from yard signs to social media profiles to radio and television commercials (including the campaign's 2008 Super Bowl ad). "If someone was listening to the radio or saw a billboard, the URL was always on there, but [the campaign] would then have to count on supporters going home, logging in and signing up," explained Bertram. "That was the nice thing about text. It was a great call to action in places where supporters didn't have immediate access [to the Internet]."
- **Live promotions and endorsements:** The campaign took advantage of its captive audience's excitement at rallies and events to explicitly ask attendees to text in. It also used celebrity endorsements, such as the time Oprah took out her phone on stage and told onlookers to text in for more information.
- **Viral marketing:** Text recipients were encouraged to ask their friends to opt in and to forward the text messages they received.
- **Tangible incentives:** The campaign offered free ringtones, wallpapers, and bumper stickers to users who opted in. "You have to give a compelling value proposition to get people to sign up," Bertram explained. "People like free things."
- **Special privileges:** The campaign promoted that it would make the first announcement of Obama's running mate via text message and encouraged supporters to opt in ahead of time to become privy to this information before it hit the press.

In addition to texting, the Obama Mobile campaign included:

- **A mobile Web site (WAP):** Supporters could also gain access to a special WAP site, developed for mobile Web browsers, by texting "SITE" to the same 62262 short code. The site was designed so that news features and other information could be easily read and forwarded. The site was not shy in prompting users to sign up for text alerts and/or invite friends to join Obama Mobile. It also included special features such as video, ringtone, and wallpaper downloads developed for mobile phones.

The iPhone application ... used triangulation and GPS, along with Google Maps, to determine users' locations and direct them to local events or campaign offices.

- **Interactive voice response hotlines:** Supporters could request more extensive local campaign information on-call through toll-free hotlines, which were promoted on campaign flyers and other advertising collateral. By punching in their ZIP codes and selecting from a list of inquiries, such as the address of a local campaign office or regional absentee voting information, users would receive the requested information by text moments later. This information could then remain on the phone for future reference until it was deleted. "It was like a modern-day post-it note reminder," Goodstein observed.
- **An iPhone application:** Capitalizing on an Apple promotion that offered students a free iPod Touch with every Mac computer purchase, as well as the recent application craze among iPhone owners, the campaign launched its own free smart phone application available for download through the iTunes store.

In developing the iPhone application, the campaign was careful to consider users' needs, ensuring it was interactive, useful, and worthy of a download, but also aligned with campaign objectives, Goodstein said.

Accordingly, the iPhone application offered users complete national news coverage, campaign photos, and videos, but it also used triangulation and GPS, along with Google Maps, to determine users' locations and direct them to local events or campaign offices. It further used this technology to connect users with local campaign news and blogs.

The iPhone application also organized users' contacts by state, with key battleground states listed first, and encouraged users to make campaign calls to their friends. Users could further organize their call lists by indicating whether a contact was "Considering Obama," "Not Interested," or had "Already Voted." This information was then anonymously fed back to the campaign. An integrated leader board, which rated users on number of calls made, motivated supporters to continue making calls. In the end, this resulted in an additional 30,000 calls made on the campaign's behalf, from personal friends who might carry more clout.

"You can't pay for that kind of one-to-one marketing," Goodstein remarked.



III. MOBILE MARKETING: AN AWARD-WINNING CAMPAIGN

Business Lessons Learned:

- Consider a mobile campaign as part of your marketing plans. As mobile becomes more pervasive, an increasing number of small and mid-sized businesses are giving it a look, especially after observing Obama's success, according to MMA officials.
- Make sure your mobile campaign is fully integrated with your other campaigns.
- Make sure it fits your demographic—younger vs. older adults.

IV. CHANGING THE WAY POLITICS IS DONE FOREVER

Integrating Social Media into the Administration



On November 5, 2008, a message that read “We just made history. All of this happened because you gave your time, talent and passion. All of this happened because of you. Thanks!” was posted to the various online channels, such as MySpace and Twitter, showing supporters that their digital connections to the Obama campaign were both valued and instrumental.

Goodstein reports that public connections, such as Obama’s friend lists on MySpace and Facebook, still continue to grow post-election, demonstrating that Americans are willing to communicate with their government via new channels.

Already, it appears that the new leadership understands this and will not allow the valuable connections already made—nor the digital lessons learned throughout Obama’s campaign—to go to waste.

The Web site Change.gov, which was launched immediately after the election, offers visitors insight into Obama’s plans as president. It encourages visitors to share their stories and ideas in the “Citizen’s Briefing Book,” and to rate or comment on others’ submissions. The campaign also recently launched ObamaCTO.org, which enables people to vote or comment on what priorities Obama’s Chief Technical Officer should focus. Obama also continues to use YouTube—posting his Saturday morning addresses on his channel.

Power to the People



In 2003, Howard Dean demonstrated how effectively the Internet could be used to raise campaign funds. In 2008, the *Obama for America* campaign showed the nation how this new medium could also be used to mobilize an army of supporters.

For Obama, there was no magical shortcut, other than perhaps the fervency of his supporters. Everything was built from the ground up “the old-fashioned way,” as Goodstein puts it. And it took a good deal of time and work and dedication from people who believed. It required establishing confidence within communities by becoming active members of those groups, reaching out and asking people for help, and entrusting them with the tools and free rein to do what they thought was right.

“The best content is what the people create themselves,” Hartman wrote in his *Obamanomics* paper. “Obama proved that when people are empowered

IV. CONCLUSION: CHANGING THE WAY POLITICS IS DONE FOREVER

It was this sweeping wave of creativity, ingenuity, and one-to-one, friend-to-friend, personal endorsements that helped put an underdog in the White House.

and trusted, they will create and disseminate their own content and their own message.”

Hartman goes on to provide examples of supporters at work, “a result of Obama’s policy of openness and freedom of expression:”

- Videos of the “Obama Girl” and hip-hop artist will.i.am’s “Yes We Can,” both of which gained widespread fame as user after user forwarded them
- The free artist-posted stencils for creating homemade Obama T-shirts that circled the Web
- A slideshow of Obama-themed jack-o-lantern photos amassed from supporters across the nation.

“By enabling his supporters, Obama was able to create a breadth and depth of content around himself and his campaign that otherwise would not have been possible,” Hartman has written. “In essence, his supporters became his creative department and his marketing channel.”

It was this sweeping wave of creativity, ingenuity, and one-to-one, friend-to-friend, personal endorsements that helped put an underdog in the White House.

According to the Cone 2008 Business in Social Media Study fielded by Opinion Research Corporation, 56 percent of respondents say they feel better served when they can directly interact with brands via social media; 41 percent prefer that companies solicit product and service feedback via social media; and 37 percent say companies should develop new ways for consumers to interact with their brands via social media.

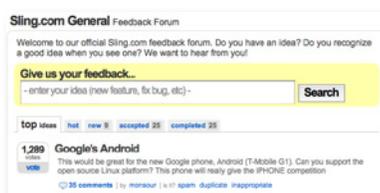
In its own way, the *Obama for America* campaign has substantiated these claims and illustrated just how willing and eager today’s consumer is to promote the things they believe in. And considering the efficiency, cost-effectiveness, and intimacy that these channels offer, it seems a risky oversight for any organization to not at least give it the old college try.

V. TIPS ON HOW TO MOBILIZE & ENGAGE YOUR CUSTOMERS

Obama's secret to winning the election was his success in transforming ordinary citizens into campaign evangelists. Obama's campaign did more than just motivate people to vote, it inspired people to get peers to vote. So, how can businesses leverage some of this magic beyond setting up a Facebook page or creating a Twitter account? What specific tangible things can businesses do to mobilize and engage customers? Which vendors can help them do it?

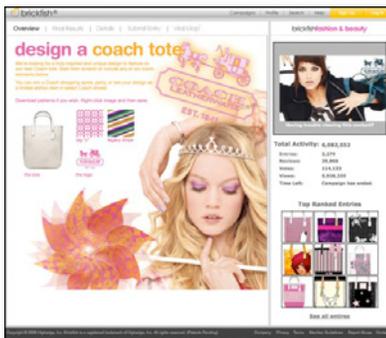
Some recommendations:

- **Simplify & Integrate Your Messaging:** For all its high-tech wizardry, Obama's success all started with something rather old-school: clear, crisp messaging. Obama's call for hope and change resonated with the electorate fed up with the current administration. You can have the greatest product in the world, but if your messaging is muddled, getting your customers behind it is that much more difficult. "If your messaging and brand is resonating, it pushes that message around a lot faster," Goodstein said. One other important point: Make sure your simplified messaging is integrating into every aspect of your marketing, both online and off. "Total integration of campaign messaging with all aspects of your business is something the Obama campaign did really well," Goodstein added.
- **Identify Your Brand Advocates:** "Nearly every company has highly satisfied customers who would go out of their way to recommend the company, product or brand to others," said Rob Fuggetta, CEO of [Zuberance](#), which markets a word-of-mouth on-demand software service. Sounds great, but how do you find them? One way is simply to ask for customer volunteers, through a newsletter or blog. Another way is to use social media monitoring tools such as [Techrigy](#), [Radian6](#) or [ScoutLabs](#) to see who's talking favorably about your brand (a free way is to use [search.twitter.com](#)). Still another is to use a service like Zuberance, which helps companies build and launch customized surveys to identify brand advocates. The company also provides tools that help customers evangelize your product.
- **Provide Feedback Mechanisms:** Get your customers more involved by allowing them to provide feedback regarding your product or service. It's a great way to get them truly vested in your business—as long as you heed some of their suggestions. [UserVoice.com](#) provides an on-demand tool that allows customers to make suggestions, and then vote on the suggestions of others. Here's a great example of a UserVoice [implementation](#). "It's all about brand affinity and part of brand affinity is getting people involved in your product," said Marcus Nelson, UserVoice.com co-founder. "People want to be heard. They want to be involved in the process." [GetSatisfaction.com](#) is



V. TIPS ON HOW TO MOBILIZE & ENGAGE YOUR CUSTOMERS

another on-demand social media service geared toward customer service. An extreme case of allowing customer feedback is the Seattle [Sounders FC](#), Major League Soccer's newest franchise. The Sounders allow their fans to vote on whether the GM gets to keep his job by voting every four years. That's innovative thinking because it makes fans feel as though they have an outright stake in the franchise, said John Van Spyk, GM of [Digitaria Sports](#) and an expert on sports democracy.



- **Leverage Contests:** Engage with customers and increase their brand advocacy through contests and other applications. Instead of hosting something on your site, try a third-party software solution, such as [Brickfish](#), which allows consumers to directly interact with a company's brand. For example, Brickfish recently ran a campaign for Coach that encouraged young shoppers to design their own handbags, with the winning design being made into a limited edition handbag. Participants could easily share their finished creation on innumerable social networks. Their friends could also leave feedback and comments on their creations. The campaign was a success, resulting in 3,200 total entries and more than 6 million engagements, said Becky Carroll, Director of Social Media for Brickfish. Online video contests are another method to engage customers. [XLNTAds.com](#) runs viral video contests for both smaller and large companies through its community of semi-professional videographers.



- **Provide Web Site Interaction & Sharing:** These days, consumers have come to expect interaction on a Web site, especially consumer-focused sites. Let your customers interact with your site and with each other by offering chat forums, product reviews, and the ability to comment on blog posts and site content. [Pluck](#), an on-demand software provider, is one option for implementing a range of interactive social media tools on your site. Zuburence also has a platform for enabling users to share reviews and content, as well as create their own specialized coupons. [BazaarVoice.com](#) is a well-known vendor for allowing customers to write product views and rank products. "The key is tapping into the passion that your most loyal customers have and give them the tools to channel that passion in a way that makes them feel good," said Adam Weinroth, Director of Marketing for Houston-based Pluck.
- **Go Mobile!** It was hugely effective for Obama, so why not extend your marketing reach into mobile? It's not just the big guys going mobile anymore. According to the [Mobile Marketing Association](#) (MMA), an increasing number of small and mid-sized businesses are launching mobile campaigns as well. The reach and immediacy of the medium are just too strong to ignore. Wehrs said there are three types of mobile campaigns you can launch:

V. TIPS ON HOW TO MOBILIZE & ENGAGE YOUR CUSTOMERS

SMS, including utilizing a short code; banner ads on mobile Web sites; and mobile applications. Given the screaming popularity of the iPhone, many businesses are building iPhone applications (both software applications and Web applications) to keep their customers engaged on the go. So how to get started? The MMA has plenty of [resources](#) to help you begin any type of mobile marketing campaign. Most large interactive marketing firms can help you build an iPhone application.



- **Try Video Communications:** Go beyond standard email communications to reach out to customers in different ways. One suggestion: Try video email or video-conferencing. The response from a video email can be dramatic compared to ordinary email and is perfect for customer or prospect communications. Seattle-based [EyeJot](#) offers a client-free video email solution that also supports attachments. It requires nothing more than a browser and a webcam, and can be customized to reflect corporate look and feel. Bob Rodkin, marketing manager at Blue Line Magazine in Toronto, uses video email to get responses from dead-in-the-water prospects. “I found I was getting a much higher response than any other method (of communication),” Rodkin said. “It helps put a face to a name and adds a certain amount of credibility to your message.” [TokBox](#) is another vendor to consider, offering both video email and conferencing.
- **Mobilize Your Internal Social Media Force First:** If you’re setting up a Facebook page, a Twitter account, or another social network account, the first place to start adding fans or followers is with your employees. They can provide a turbo-boost for getting your social media efforts off the ground. Many companies overlook this fact. “Some companies try to figure out how they get a presence on Twitter when they have 20,000 employees,” said Hartman, of Yovia.com. Getting your employees involved first is also a good litmus test because if you can’t get them involved, chances are your customers won’t want to get involved either. Once you’ve gotten your employees involved, reach out to customers and partners.

The *Obama for America* campaign is certainly a marketing success story for our times. What’s particularly interesting is that it offers takeaways and inspiration not only for political campaign organizers. This report has called out many tactics we would all do well to emulate.

ABOUT THE AUTHORS

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