HOW CANDIDATES CAN USE THE INTERNET TO WIN IN 2010

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Introduction: Using the Internet to Win in 2010

Barack Obama won't be on the ballot in November of 2010, but thousands of other candidates will — and he'll be very much on their minds. His public image will shape the political environment, of course, but plenty of politicians and political professionals on all sides will also look to his ground-breaking online campaign as an inspiration, seeking to replicate his success at using the internet to raise money, find supporters and put people to work in the real world.

But running for state legislature, a congressional seat, a governorship or even the U.S. Senate is different than running for president, and relatively few down-ballot candidates have done much more than dip their toes in the digital waters so far. That's likely to change soon: despite the vast gap between a national race and one for dog-catcher, many of the same online political rules apply and most of the same technologies are available. Here's why state- and local-level campaigns should pay attention to the potential of internet-based politics in 2010.

1. The Internet is (Just About) Everywhere

Regardless of local demographics, the internet can be a factor in almost any election in the U.S. In wealthier urban and suburban areas, most voters will be online and a majority will have broadband access, but even in far-flung rural areas or poorer parts of cities at least email is usually available. Not every segment of U.S. society is well-represented online, but the politically active are much more likely to use the internet for news and information than their tuned-out neighbors. And despite stereotypes, the days of the computer as a young person's preserve are long gone — the majority of people 65 and up now connect electronically at least on occasion.

2. Online Fundraising Works

If the 2008 presidential race taught us anything, it's that the internet is one hell of a cash machine — Obama's ability to raise as much money as his campaign could reasonably absorb, in part by returning to the small donors who stuck with him again and again through the worst, was decisive. State and local campaigns are getting more expensive every cycle, a trend that will probably accelerate if campaign finance limits dissolve, and candidates at all levels will likely find themselves turning to online donations to keep up.

But online fundraising doesn't happen by magic — it's usually the result of a concerted strategy to make it happen. Fortunately for us…

3. The Tools and Techniques are Available to (Almost) All

As vendors have developed software suites that scale to match campaigns of different sizes, internet-based fundraising and supporter-management packages are now within reach of almost any political operation. Best practices for using them are no secret, either, since plenty of strategy guides supplement the clear example of the Obama campaign itself. The essential tools usually include a website, an email-based Constituent Relations Management system and an online fundraising module, which campaigns can then promote through online social networks, video, blogger outreach, Google Ads and other channels.

4. Targeted Online Outreach + Down-Ballot Candidates = a Perfect Match

Top-level presidential candidates seem to get media attention every time they open their mouths, but the problem for state and local campaigns is more often to get noticed at all. In races with limited resources and little press coverage, the inherent ability to target most online outreach at low cost can help stretch a tight budget.

In a densely populated urban or suburban area, for instance, broadcast TV advertising is impractical for many campaigns because too many spots will be wasted on viewers outside district lines. In that case, cheap Google and Facebook ads could work alongside targeted cable TV spots to spread messages and help find supporters, donors and volunteers in a defined geographic area.

Blog outreach may also be more of a priority for a local candidate, since state and regional political blogs (and Twitter!) provide convenient watering holes for political activists. Like many other forms of social media outreach, blogging and blogger relations are usually cheap financially but expensive in time, a good fit for scrappy campaigns with more enthusiasm than cash. Regardless of scale, just about any campaign can also benefit from having a body of clear, topical and targeted content on the web in a variety of outlets, since voters, bloggers and journalists alike will be turning to Mr. Google for basic information about local races.

5. You May Not Be Online, But Your Opponents Probably Are

Bringing up Google illustrates why modern campaigns ignore the internet at their peril, because the other side probably isn't following the same script. For instance, if you're a candidate and your opponents AREN'T raising money online, they're at least posting content that criticizes you, which is going unanswered if you're not responding. Candidates can't control the online political debate, but they can influence it — in the world of blogs, YouTube, Google and social forwarding, a robust online presence isn't just an offensive weapon, it's also a powerful defense. The best response to an online attack? An established foundation of good content, plus aggressive outreach and a lot of trusted voices speaking on your behalf.

6. Turnout is Key in Off-Year Elections

With no presidential candidates on the ballot, 2010 voter turnout is likely to plummet from the heights it reached in 2008. In an election in which relatively few people vote, identifying your supporters and motivating them to actually show up at the polls is absolutely key. As we'll see in the chapters ahead, online technologies turn out to be perfect for maintaining communications with many people at once and in an affordable way (email is cheap), helping to build the connections that yield donations, volunteer time and (ultimately) votes.

Begin at the Very Beginning

Okay, we're convinced — so where do state-and local-level candidates start? Let's look next at the essentials of online political campaigning, including the basic tools and activities involved and the resources needed. After that, we'll talk about using the internet as an outreach tool in competent and creative ways, followed by a special chapter on everyone's favorite topic, online fundraising and mobilization. We'll wrap up the series with a sample campaign online outreach plan, plus some resources for further study. So, on to the tools.

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Chapter Two: Tools, Time and Resources

Using the internet for politics may seem new, but most of the things a campaign does online are really just reincarnations of some classic political act. For instance, think of a website as the electronic version of a storefront office, while the process of working with bloggers is a lot like old-school print or broadcast media relations.

But compared with traditional political tools, the internet truly excels at maintaining relationships with many people at once. Channels like Facebook, Twitter, YouTube and in particular email connect campaigns directly with their donors and volunteers, providing a means to distribute news, messaging points, event invitations and appeals for time and money. With planning and effort, the connection can go both ways, letting a campaign actively tap the social connections and even the creativity of its supporters.

Political professionals trained in the broadcast era often have trouble adapting to the back-and-forth nature of online communications (TV ads aren't exactly interactive), but the rewards for embracing it can be tremendous. As Barack Obama showed in 2008, campaigns that actively engage their supporters can ask an immense amount from them in return.

The Basic Tools

Large or small, most campaigns will end up with the same three basic online elements:

- A central hub, usually a website.
- A way to stay in touch with supporters, usually through an email-based Constituent Relations Management System but potentially including Facebook, MySpace, Twitter and text messaging.
- Online outreach, to influence the wider public discussion and recruit new supporters and donors.

Let's look at each piece in detail, with websites and CRMs covered below and online outreach a bit later.

Website

Except in the rare case that Facebook page or MySpace profile will do, just about every campaign needs a website if they intend to use the internet at all. A campaign website's primary goal is usually to help build a supporter database, meaning that no visitor to the site should leave without an opportunity to join up and turn their online enthusiasm into the potential for real-world action.

When it comes to the conversion process, content is key. Voters, bloggers and journalists alike will be looking for substance, though looks do matter, since a well-designed site can help make a good first impression.

A website lets a campaign present its case in the strongest possible way, telling the candidate's story through words, photos and video. Integration with other aspects of the campaign's online outreach is key, since the site benefits when it's used to aggregate, organize and feature content from YouTube, Twitter, Flickr, blogs and the various other facets of a campaign's online presence, making it a true outreach hub. Of course, even the best content is useless if it's hard to find or consume, so a campaign website needs to have a straightforward navigation scheme, with information clearly labeled and broken into digestible chunks.

Completing the connection, every scattered piece of the campaign's online content should refer back to the main website — people shouldn't be able to encounter the campaign online without also finding a way to get involved. Online content is potentially recruiter and persuader both, since it attracts visitors via Google and the sites such as YouTube and Facebook on which it's hosted.

Once supporters have given over their information, they're in the hands of a campaign's CRM system, usually a web-based tool rather than software residing on the staff's own computers.

Constituent Relations Management Software

A typical CRM system combines a database and a mass-email program to automate the basics of communicating with supporters over the internet. While individual platforms vary in cost and capabilities, just about any CRM is an improvement over, for example, hand-entering supporter information into Excel and mail-merging the results into Outlook. By employing standard web-based forms, CRMs ease the process of joining, leaving or interacting with a list, while on the back end they allow list managers to send messages to some or all members at once and usually at no incremental cost (fees are typically based on features and list-size rather than usage).

Most CRMs can also break a list into chunks based on members' location, demographics or past behavior such as donation history, a capability that lets list managers target messages at people deemed likely to respond to them. It's also ideal for testing, for instance trying out different strategies on small parts of a list before rolling them out widely. The more information a campaign requests, the more it has to work with: for the Obama campaign, the neighborhood-level data that came up the chain from volunteers was at times more accurate than polling.

CRMs designed for candidates typically incorporate an integrated online fundraising system, and can also include more advanced modules that allow supporters to organize events, run personal fundraising efforts and download lists of neighbors to visit or phone numbers to call. Regardless of their additional options, most CRMs use mass email as their primary weapon. though some have begun to include social networking messaging options.

Why email? Despite the hype about Twitter and Facebook, it's still the most effective tool to raise money, motivate volunteers and keep supporters engaged — for example, roughly two-thirds of the $500 million that Barack Obama raised online came directly from someone clicking on a "donate now" button in an email message. Email reaches many people who still haven't joined the social web, and it's also turned out in practice to have much higher response rates than other channels, often by a factor of ten or more. Email remains the "killer app" of online politics, despite constant predictions of its demise.

Not that we're talking about spam! Campaigns should use mass email only to communicate with people who have "opted-in" to their list by signing up online or at an in-person event. Except for targeted outreach messages to bloggers, journalists and activists, email messages should serve as a relationship-management tool, not as a recruiting tool (though every respectable CRM includes "tell-a-friend" links to help messages spread from person to person).

As for staying in touch with supporters via cell phone text messaging, it's been the "next big thing" in online politics for several years now — and it still is. Most CRMs can collect cell numbers, but so far relatively few campaigns in this country have been able to put them to use, in part because of constraints built into the U.S. telecom system. Text messaging will no doubt be a good fit for certain campaigns in 2010, but it's likely to remain more of a niche application for now.

Website/CRM Vendors

Ten years ago, most online campaigns were minimal or hodge-podge affairs. The websites were usually custom creations, done by a random vendor or by someone's nephew, and while some CRM systems did exist, they were in their infancy. As was online fundraising — the masses had yet to become comfortable giving up their credit cards to the internet demons.

Nowadays, many state- and local-level campaigns still piece together an online presence, perhaps combining inexpensive tools from a company like ElectionMall with a website built by their media consultants or a local firm. But candidates can also choose from an array of tailored professional offerings, particularly on the Democratic side, where vendors now offer integrated website/CRM/fundraising packages for just about every campaign budget, often accompanied by consulting on effective online strategy and tactics. Several hundred state-level Democratic campaigns used DLCCWeb (integrated with fundraising site ActBlue) in the 2008 cycle, for example, while others moved up the cost/hand-holding scale to systems from NGP Software or Blue State Digital.

Republican candidates don't seem to have access to quite such a wealth of choices, at least for the 2010 cycle. A number of consulting firms have sprung up in recent years, with newcomers like EngageDC joining stand-bys like (the former) Connell Donatelli, but the Right still seems to lack the kind of standardized technology packages now available to Democrats up and down the ballot. Their online fundraising has lagged as well, since despite its ambitions a service like SlateCard still can't match the reach of an ActBlue.

[The Left seems to have jumped ahead in the race for packaged, scalable campaign software over the past few years in part because of the example of the Dean and Kerry campaigns in 2004, but also because of the work of individual activists, like the founders of ActBlue and the prominent bloggers who've helped channel online donations to chosen candidates. Democrats also benefit from the growth of progressive nonprofit advocacy campaigns over the past decade: not only have advocacy groups experimented with just about every tool or tactic in the book, but the existence of so many independent groups clamoring for effective technology has created a vibrant market. The technology behind DLCCWeb, for example, derives directly from a CRM developed for nonprofits.]

This imbalance will not last! As usual, the tools don't care who uses them, and neither Democratic nor Republican campaigns have inherent advantages online, other than the ones they create for

themselves. Soon enough, Republicans and Democrats will reach digital parity.

Budget, Staff and Time

What kind of resources should a campaign put into online outreach? It's a common question, but unfortunately one without a firm answer — TV ads are still the best way to reach uncommitted voters, but the internet builds connections that can be tapped again and again, making the two media hard to compare. Plus, costs aren't always costs, since an online fundraising program can pay for itself (as the Obama campaign proved), and many campaigns have found the Return On Investment from targeted Google Ads to be surprisingly high.

Rather than thinking of "online" as its own separate world, smaller campaigns should follow Obama's example and integrate the internet more broadly into their operations. For instance, traditional media relations and blogger relations require most of the same skills and employ many of the same tactics, so even if resources aren't available for a standalone blog team, the press folks could include bloggers and Twitterers in their outreach portfolio. On other fronts, campaign's media consultant can produce online video clips, though they'll have to adapt to a very different world than that of campaign commercials, and field organizers can embrace Facebook and other social networks as well as cell phones and text messaging.

In some ways, more important than the resources devoted to online outreach is when they're employed. List-building and much of the rest of online outreach are incremental and reward an early start. For instance, even before a campaign has a CRM in place, it should collect names and email addresses whenever possible, since the candidate can always bring a laptop and a staffer or volunteer to real-world events.

Unless it's flying under the radar for some reason, a campaign should generally establish a presence in prominent online spaces as soon as possible, beginning the process of feeding the website and CRM via a Facebook profile, YouTube channel, MySpace page and perhaps a Twitter account. They should also reach out to prominent online voices early, building relationships with relevant bloggers and Twitterers just as they would with local officeholders, party activists and journalists.

For a small or even solo campaign, aggressive online activism needn't take up too much time. Once the website is created and the CRM configured, social media channels like Facebook take

only minutes to set up. Even buying Google Ads can be relatively straightforword! Since an active campaign should be creating a constant stream of content in the form of announcements, press releases, videos, photos, position papers, etc., the main time commitment (beyond direct outreach to online influentials) is usually keeping the various channels fed, egos massaged and incoming messages answered.

A rule of thumb? If you're a small campaign with a single staffer, try to spend 4-8 hours planning and executing your online-specific strategy per week, at least at the beginning, remembering that those early hours can be far more valuable than time spent right before the election.

One additional and critical consideration: keeping up with a campaign's internet presence needs to be someone's defined responsibility, since otherwise it tends to fall through the inevitable cracks. Obviously, as we move up the scale campaigns should devote more resources to online outreach, particularly to the process of turning passive followers into active donors and volunteers. Regardless of their size, campaigns will constantly be buffeted by outside events, but they should take care to keep the steady process of building a supporter base on track even as day-to-day events scream for attention.

Technology Isn't Strategy

Tools are important, but so far we've mostly skipped over the vast difference between having the technology and using it effectively. Successful campaigns spend as much time planning their activities and developing procedures as circumstances allow — they know that while anyone can send a mass email, getting the most out of an email list takes an actual strategy. As simple or sophisticated as a given tool is, what really matters is how you use it.

From here on out, we'll discuss exactly that: how candidates can put online technology to work in 2010, first for outreach and then for mobilization and fundraising.

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Chapter Three: Online Outreach

Once a campaign has the basic technology in place, it can begin to take full advantage of the internet's ability to deliver donors, volunteers and voters. With new social communities like blogs, Facebook, YouTube, MySpace and Twitter creating fresh fishing holes, much of a campaign's online outreach will take place in very public venues.

But politicians and their staffs can also reach out behind the scenes, for instance sending emails or Facebook messages to selected bloggers, Twitterers and activists, usually in the hope of creating connections that will lead to more public affirmations of support. Campaigns can target online advertising with a different kind of precision, reaching people with appeals and messages that match the content they're reading or the keywords they enter into a search engine.

The variety of outreach outlets available to online communicators can be overwhelming, so let's start with a few basic principles to help sort out the options.

Go Where The Audience Is

If you want to get the most bang for your campaign buck, go where the right people have already gathered, which in 2010 will usually mean Facebook, MySpace, Twitter and/or blogs — it's usually much easier to tap into an existing community than to create one of your own. Online advertising, particularly search (Google) advertising, is another way to reach people as they go about their business on the web.

Have a Clear Connection Back

Regardless how someone encounters a campaign online, they can't act unless they have a way to follow up. Every element of the campaign's online presence should link to a recruitment form, and when possible individual "landing pages" should be tied to the source: for instance, a Google Ad about a candidate's policy on taxes should link to a page that both talks about the topic and that invites readers to join the campaign based on that particular issue.

Content Supports Outreach

It should be clear by now that an outreach campaign doesn't have much to stand on without content, since video, words and images provide the raw material that attracts notice and makes the candidate's case. Without good content (a good story, essentially), it's hard for anyone to break through the constant online clutter — if you don't have something to say, people aren't too likely to listen.

Integration is Key

Ideally, the separate elements of an online outreach campaign reinforce each other. A candidate can use his or her email list to promote a new YouTube video or Facebook page, for instance, while blogger outreach can introduce the campaign to new audiences, some of whose members will join the list and become potential outreach hubs themselves. Online/offline integration is equally key, since much list-building takes place at real-world event. Don't forget to include the website address on yard signs, car magnets, t-shirts and every other piece of collateral material possible!

Targeted and Scattershot Outreach Can Coexist Happily

Sometimes online outreach works best when it's directed like a rifle shot at a particular target, but a good shotgun still has its place. The ease of online self-publishing has created a whole new class of "network influentials," a category that includes national and state-level bloggers, prominent Twitterers, individual activists with large personal networks and the administrators of sizable email lists — basically, anyone with a following. Sometimes a campaign can identify and target the right individual voices intentionally, but often it can be hard to predict which story will catch which person at the right moment to break through.

The best answer seems to be a combination of targeted and untargeted outreach: online communicators can use a sharpshooting approach when appropriate, connecting personally with targeted bloggers, Twitterers and journalists, while still blasting information out via mass email, YouTube, Tweets, Facebook updates and blog posts. The targeted approach will often give the best results, but at other times a random and potentially overlooked channel can actually turn out to be the most productive.

The Tools:

Online Social Networks

Facebook and MySpace have become the modern equivalent of town squares, places where people from all walks of life can mingle and connect in a public environment (roughly one-sixth of our online time in the U.S. is now spent on social networking sites). The two sites vary in popularity in different communities (for instance, Facebook tends to predominate on the coasts, while MySpace retains more of its members in the country's midsection), but many campaigns will need to create a presence on both sites and in some cases on niche social networks such as Black Planet as well.

Facebook profiles and MySpace pages are easy to create but require follow-on work to reach their full potential. It helps to connect aggressively with potential "friends," perhaps starting with the candidate's own social connections and moving on to party activists, local officials, bloggers and the members of your own supporter list (include a link to your profile pages in mass emails and they'll do the work for you). Regular updates keep a campaign in front of supporters' eyes, particularly on Facebook, and asking people to repost your content to their own profiles will expose it to their extended social networks.

One rule of thumb in social networking outreach: move people onto your email list as quickly as possible, because email appeals have a much higher response rate than Facebook or MySpace messages. Not every one of your "friends" will join your list, but a campaign is likely to get more work and more donations out of the ones who do.

Blogs

If social networks are the modern town halls, blogs are more like watering holes, places where the like-minded stop by for news and gossip. Campaigns often try to reach blog readers by connecting with authors behind the scenes to pitch stories and influence coverage. Campaign staff can also participate in public through the online discussions taking place in the comments sections of most blogs, and candidates themselves can take advantage of opportunities to guest-publish on popular or relevant sites. Finally, campaigns can consider advertising on political blogs, particularly since ads on state- or local-level blogs are often a cheap way to reach a concentrated political crowd

(plus, bloggers tend to notice who's advertising on their sites...).

The first step in blogger relations is research, since time spent contacting the wrong sites is likely wasted. LeftyBlogs and the E Talking Heads directory can be a good place to start, as is Google — just run a search for "political blogs" and your state or region and you'll be on your way (most bloggers actively link to others in their interest area, so finding one site can introduce you to an entire network). Campaigns can also seek out blogs that focus on a particular issue dear to the candidate's heart, whether it's immigration, gay marriage or science funding, hoping to pick up financial or other support from outside their immediate districts.

Should a campaign have its own blog? A blog can be a good way for a candidate to show a more personal side than a press release, but they can also consume an immense amount of time. Few campaigns not gifted with a natural writer on hand will be able to devote the resources to keep a blog up to date.

Twitter

Twitter is the very short equivalent of blogging, with a dash of social networking thrown in — individual Twitter messages ("tweets") are limited to 140 characters in length, and people generally have to choose to "follow" someone's Twitter feed in order to see their updates. Some politicians have taken to Twitter like a duck to water, though the results of unfiltered Twitter-posting can be dangerous to a political reputation (plenty of room for a gaffe in 140 characters).

Used properly, a Twitter feed can be a great way to reach those network influentials discussed above, since while Twitter's audience is still relatively small compared with Facebook or MySpace, it's filled with be bloggers, journalists and political activists. A Twitter following tends to grow with use, assuming a campaign participates in the ongoing conversation and has something interesting to say, making it another of those tools that usually requires time rather than money to succeed.

Just as with bloggers, a campaign can contact prominent Twitterers directly, both for the initial connection and to pitch stories down the road. Another common way to get on a Twitterer's radar screen is to repost ("retweet") their content with an acknowledgement of the source, something that active users tend to track.

A note of caution: campaigns need to be particularly careful to distinguish between a candidate or officeholder's Twitter feed and one updated by staff, since Twitter as a community tends to value

authenticity. If Twitterers find out that a "candidate's voice" is not actually his own, the campaign's credibility can take a hit. Campaigns can use both approaches in a single feed if it's clear whose voice is speaking at any given time, and can even turn a relatively rare candidate appearance on his or her own feed into an event to promote.

One final note: once a campaign has a Twitter feed, people will expect to be able to follow it and interact with the author(s). Don't start a feed only to let it die of neglect.

Online Video

Online video is a natural for most campaigns, accustomed as political professionals are to the world of television ads. In recent years, the proliferation of cheap cameras has combined with the advent of free online video hosting and widespread broadband access to make online video a far more effective proposition than before. Video often evokes a stronger emotional reaction than text or still images alone, making it a powerful way to tell stories or make a political point, but online video isn't television — the kinds of content that succeeds can be quite different, with authenticity (that word again!) and topic typically more important than polished visuals.

While campaigns often embed YouTube-hosted clips on their own websites and social networking pages, YouTube has also become a useful outreach channel on its own — many people now bypass Google to go directly to YouTube to look for information, making the site effectively the second-most-popular search engine in the U.S. To maximize the chances of people finding their content, campaigns should carefully title, annotate and tag each YouTube clip when they upload it. They should also be sure to include a link back to their website in the clip description, and when possible "watermark" clips with the site's URL so that it's visible as the piece plays.

The "Macaca moment" gave online video a bad reputation in some political circles after the 2006 election, with campaign professionals horrified at the thought of their clients' every public mistake ending up as fodder for online hecklers. But YouTube actually turns out to be a good counter to embarrassing content, since a campaign can use its own videos to respond to an offending clip, or at least to push it farther down the list of search results (a tactic sometimes referred to as "flooding the zone").

Online Advertising

Another frequent tactic used to dilute the effect of an unflattering story is to purchase Google Ads linking to a counter-story and aimed at people searching for the scandal, just one example of the ability of search advertising to reach a defined audience with the right message at the right time. Google Ads can actually be targeted on several levels, not just by topic ("keyword") but also geographically. Note that advertisers only pay when someone clicks on a Google Ad, but even when they're not clicked they can have a secondary (and effectively free) branding or messaging effect on readers.

Campaigns frequently buy ads on their own candidate's name, their opponents' names and on issues relevant to the race, but some savvy advertisers have learned to get good results through more subtle keyword buys, including the noteworthy "large animal veterinarian" run used to good effect in Minnesota in 2008. Landing pages are a particularly important consideration for a Google Ad campaign, since people may be arriving from searches on many different keywords and will need to see content that connects with the ad they actually clicked on. Conversion is a multi-stage process!

Google Ads have already proven themselves in the political space, particularly as a recruiting tool. The Obama campaign for instance found that they yielded a three- or four-fold Return On Investment (occasionally as high as ten- or fifteen-fold) when measured in terms of donations received from a given signup. Campaigns have also used search ads as a electoral turnout tool, connecting voters with information about their polling places or last-minute volunteer opportunities.

Though partially supplanted by search ads, traditional online display ads ("banner ads") still have political uses, particularly when run on local media sites. As with Google campaigns, political advertisers generally focus on measuring a banner ad run's "click-through" rate, but banners also convey branding and messaging points whether they're clicked or not. Another advertising angle to consider is advertising on Facebook and portal sites such as Yahoo or AOL, since they frequently have extensive demographic data on their members.

Other Online Communities

We've mostly talked about reaching public online communities so far, but campaigns can also try

to reach conversations that are taking place a little more out-of-sight. For instance, many people participate in email lists and discussion groups, but it's likely to take some creativity to find and interact with them. One possible strategy is guest-posting, for instance approaching the administrators of the email newsletter of a union or trade association in your state or district with an article aimed at their readers. More often, though, you'll connect with less obvious online communities like these as a byproduct of your overall outreach — your supporters will be your voice in the individual channels they use.

Getting People to Act on Your Behalf

As the experience of the Obama campaign showed, one of the most effective ways to spread a campaign's message online is to get someone else to do it — every supporter is a potential outreach hub in his or her social universe. Campaigns may reach supporters through a social network or Twitter, but they usually ask for help by sending them an email with a specific request, making the CRM a surprisingly useful outreach tool. For instance, campaigns can ask supporters to:

- Recruit new list members

- Spread the word about a fundraising push

- Promote a YouTube clip or blog post

- Post content to MySpace or Facebook, turning their profile into a "virtual yard sign"

- Link to the campaign from Twitter or their personal blogs

- Attend real-world events (rallies, house parties) and invite their friends and family

Campaigns can make the process easy by preparing banners, badges, buttons, videos and other content that fans can post on their own pages. And as we'll discuss in much more detail in the next chapter, every action a supporter takes helps to create an emotional connection with the campaign, influencing his or her likelihood to volunteer or to donate in the future. With that, let's move on to the part of this guide that political professionals have been waiting for — online fundraising.

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Chapter Four: Online Fundraising and Mobilization

What Dean and Kerry suggested in 2004, Barack Obama proved in 2008: an army of motivated online donor/volunteers can be a truly decisive force in politics. And with software designed to allow campaigns to tap the enthusiasm (and the wallets) of supporters both within their districts and around the country now widely available (see Chapter Two), 2010 should see an explosion of online fundraising at the state and local levels.

It helps a campaign immensely if most individual donations, even the big ones, come in online rather than as paper checks. First, money collected via credit cards is available instantly, allowing a candidate to take immediate advantage of an overnight surge of income. Plus, online donation details automatically end up in a database, simplifying accounting and reporting. By contrast, physical checks present a logistical burden, since each has to be processed individually whether it's collected at a fundraising dinner or arrives in the mail.

As the Obama campaign found, online fundraising also lets a campaign tap the vast number of politically interested people who can't donate hundreds or thousands of dollars at time but whose smaller donations can add up to a princely sum. Obama's grassroots donors tended to send relatively small amounts repeatedly, which in turn shows why a small-donor list is such a valuable resource — it's the gift that keeps on giving, quite literally. Unlike traditional big donors who often reach their quota for a given candidate with a single check, small donors can contribute again and again, providing a financial consistency that's useful in a short campaign and priceless in a long one.

The Basics

So, how does online fundraising work? Essentially, giving to a candidate is just like buying a product online — aspiring donors go to a website and enter a credit card number and the necessary personal information, then click the "donate" button. Once the transaction is processed, the money passes to the campaign's bank account, either immediately as a single transfer or periodically as donations add up.

Depending on the details of the Constituent Relations Management system the campaign uses

and the extent of its integration with the fundraising system (see Chapter Two), donation details may automatically populate the same database used to track supporters and volunteers (otherwise, staff may have to download the data and integrate it into the CRM as a separate step). Obviously, the closer the two systems work together, the more easily a campaign can track top donors.

If You Build It, Sometimes They Will Come

Where do new online donors come from? Some will hit your website entirely on their own and without any prompting from a campaign, driven by word-of-mouth or by news in the race. After Sarah Palin's convention acceptance speech in 2008, for instance, Barack Obama's website saw a huge influx of cash even before his staff had time to send out an email solicitation — his supporters didn't care for what the Alaska governor had to say and were eager to let it be known. Consequently, it behooves a campaign to make it as easy as possible for spontaneous donors to act, ensuring that the website's "donate" button is prominent and that the transaction itself doesn't have any speedbumps.

To maximize the chances of capitalizing on such "drive-by" support, a candidate will want to be visible in as many places online as possible, either via advertising or through campaign-created content (see Chapter Three). Online recruitment is all about being where the potential donors are, whether it's on Google, YouTube, Facebook, political blogs or local media sites.

More often, politicians won't need an umbrella to ward off an unanticipated rain of dollars: they'll have to work for for every cent they get.

Motivating Donors and Volunteers

If political support ultimate comes down to emotion — how a potential donor or volunteer feels about a candidate or a race — every contact people have with a campaign influences their propensity to give time or money. Every interaction matters: their experience at an in-person event or a storefront office, what they see online, the ads on their televisions, and of course any direct communications they receive via email, phone or direct mail. Successful online fundraisers realize that they are essentially managing virtual relationships with many people at once.

Like any friendship, a political relationship that heads downhill can be hard to salvage

(disillusioned donors are unlikely to open their wallets again), and unless a campaign is entirely short-term and doesn't mind burning bridges, properly managing and motivating supporters over the course of a race will be paramount. List size matters, and campaigns should take every opportunity to grow their own, but list response is just as important, since a relatively small number of motivated people can outperform a much larger group whose members don't have much coordination or reason to care.

One excellent way to turn people away over time is to treat them like cash machines, something that's entirely too easy for political professionals to do. In fact, early in the Obama campaign, manager David Plouffe frequently had to mediate between a fundraising team eager to maximize short-term revenue and a new-media team with an eye on the long game.

At a basic level, not every communication from the campaign should ask for money. Instead, campaigns should think of ways to provide value to supporters in the form of news, information and giveaways, as well as of non-monetary ways they can contribute. Getting people to recruit ten friends via email, for instance, is an easy way for them to participate without having to part with a dime — and once they've taken that action, they're more involved and committed than they were the day before.

A common approach to supporter management is to provide activists with escalating levels of engagement. Like a the rungs of a ladder, each higher engagement level requires more work and holds fewer people, but ideally it also creates more value for the campaign or cause. Over time, list managers will obviously try to move people to higher tiers, converting casual list-members into donors, donors into volunteers, and volunteers into precinct leaders. With a sophisticated CRM, campaigns can get creative in how they track supporters, noting the most reliable activists in the database and putting these "super-volunteers" to work in ways that use their skills, connections and time.

Tiers of engagement work in the other direction as well — if you're planning a social media-style create-a-video contest, for instance, find a way to involve people who AREN'T actually doing the shooting and editing, perhaps by asking them to rate or comment on the submissions. The overall goal: keep the most casual supporters working at a basic level, while also providing more strenuous outlets for the smaller core of true activists.

Successful Email Campaigns

Regardless of what a campaign is asking supporters to do, they're likely asking it via email. As we've covered before (see Chapter Two), email remains the most effective way to stay in consistent online contact with many people at once, despite the growth of Facebook, Twitter and other social tools — and it's the best online fundraising channel we currently have.

Of course, anyone can send an email message asking people for money, but getting the most out of a list over time takes skill, planning, good execution and testing. Let's look at some basic principles that help maximize a list's long-term performance:

- Emails should perpetuate core messages and goals of the campaign. A key idea: the three Ms of political email are messaging, mobilization and money.

- Emails must also do no harm — list managers must take care not to alienate people on the list.

- The more personal, informal and direct a message is, the better (usually). Messages may appear to come directly from the candidate, from staff, from prominent supporters or from individual campaign volunteers, depending on whose voice the campaign needs to amplify at that moment. Regardless of the apparent sender, authenticity is key.

- Make the ask clear and the action links easy to find.

- Targeting helps get the most out of a list. For instance, list members might receive messages with different content based on their locale, their interests, their demographics or their past pattern of actions on behalf of the campaign. A good CRM is a targeter's friend.

- Email may start the process, but the landing page finishes it, so make sure that each message links to a donation or action page that matches the ask in the message.

- Use the email initiation sequence to start a relationship off on a good foot, sending new list members a pre-set series of messages after they sign up. The sequence might steadily "scale the ask," encouraging newbies to move up the ladder of engagement.

- Besides scaling the ask over time, savvy fundraisers also tailor the ask over time, for instance soliciting different amounts based on a person's donation history — a $10 donor might be asked to donate $20 the next time around, but someone who'd donated $150 might be safe to hit up for $200.

- Campaigns should also vary the ask — as discussed above, not every communication from the candidate or his surrogates should be about money. Some might deliver talking points, others strategy or context, while a few may be straightforwardly inspirational.

- When possible, staff should map out email narrative arcs in advance, with each message forming part of the stream while also able to stand on its own. But this approach shouldn't preclude seizing on emotion and the moment, such as capitalizing quickly on an opponent's gaffe.

- Campaigns should also consider the "value proposition of fundraising," being careful to portray donations as doing more than just providing abstract support. To that end, campaigns often make it very clear where money is going, for instance raising funds for a particular stated task such as running TV ads or supporting grassroots organizing in a defined area.

- Even if a campaign is overwhelmingly relying on email, content integration can be key, with online video and social networking outreach in particular serving as a powerful adjunct to email fundraising. For instance, a particular message might ask people to watch a video and spread it via Facebook, with the video itself and the landing page on which it's hosted doing the heavy lifting of soliciting donations.

- Despite the best targeting, different emails activated different people at different times. No one message has to connect with every supporter or every voter — if you miss 'em this week, you might get 'em next week.

How Much is Too Much? (The Importance of Metrics and Testing)

How many messages can a campaign send to supporters before they click the "unsubscribe" button? To find out, email communications managers can monitor statistics, since modern CRMs will track when people sign up, when they drop off, which messages they open and what kind of actions they take.

Lists turn out to have their own quirks: while one could be very open to tell-a-friend or volunteer requests but not so good at giving money, another might respond in exactly the opposite way. Each mass email staff send provides raw data about that campaign's specific supporters, helping to identify the kinds of appeals that work and which to avoid. Metrics and list segmentation can even assist with message development, since campaigns can try out different ideas on relatively small

groups first.

Of course, as an election or other deadline approaches, managers can get away with sending many more messages than usual, since people will understand the urgency. Don't forget to follow up after the vote, particularly if your candidate plans to run again!

Viral Fundraising

Another aspect of the Obama fundraising machine that other campaigns can copy is its peer-to-peer component, the personal fundraising campaigns that individual volunteers launched through their MyBarackObama.com accounts, alongside all of their other online outreach.

Supporter-driven distributed financial outreach raised a few tens of millions of dollars directly for Obama's campaign, but perhaps more important is that it helped mine individual fundraisers' social connections for new donors, who would then find themselves on the main email list and subject to the kinds of "encouragements" described above. Though likely less of a priority for smaller-scale campaigns, the capability to create friend-to-friend donation drives is included in many CRMs and is built in to the technology of sites like ActBlue.

Custom Social Networks

Some campaigns provide additional opportunities for volunteers by creating custom social networks along the lines of MyBarackObama.com. Bob McDonnell's 2009 campaign for Virginia governor featured a community based on the Ning platform, for instance, which provided an outreach and fundraising hub for activists.

A custom social network turned out to be a useful tool for Obama volunteers, particular when it let them organize themselves in places where the central campaign's infrastructure wasn't fully built out. But Obama's campaign also had an enormous supporter list to populate MyBO from the moment it launched, and other political social networks risk sputtering out if they can't reach a significant scale right away (a site is neither social nor a network if no one's using it). Most down-ballot campaigns will be better served by focusing on reaching people in the online spaces they already frequent, rather than trying to get them to join a new one.

More Than Money: Mobilization Means Votes

This chapter has primarily focused on donations, but supporters are worth more than just the contents of their bank accounts. Smart campaigns will try to tap their brains and time as well, and the engagement techniques described above are as applicable to mobilization as they are to fundraising. The Obama campaign relied on volunteer enthusiasm to a remarkable degree, with hundreds of thousands of people downloading "walk lists" of houses to visit in their neighborhoods and phone numbers to call. They reported the results of their outreach work through a comprehensive grassroots data collection system, in turn giving the leadership priceless data about how the campaign was playing out at a neighborhood level.

This kind of sophistication is out of the reach of most state- or local-level campaigns, but they can still use online communications to mobilize supporters to:

- show up for in-person events
- volunteer at local offices
- phone-bank, either at a campaign office or over their own cell phones
- connect with their neighbors door-to-door
- recruit friends via email, Facebook or MySpace
- put up yard signs
- view online content and spread it virally
- create content such as blog posts, Tweets or online videos
- and of course, **vote!**

The importance of that last bullet cannot be overstated for down-ballot candidates, particularly in a low-turnout off-year election!

Putting It All Together

That's it for the essentials of internet political campaigning. Next, let's pull it all together into a basic online communications plan.

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Conclusion: Putting It All Together

Winning in 2010

2010 will not be 2008: for one thing, we aren't likely to see the massive voter turnout that helped put Barack Obama in the White House. As in other political off-years, the 2010 results will swing on the decisions of a relatively small number of voters, an effect that will be magnified down the chain — the smaller the race, the more effect a handful of votes will have. This kind of environment obviously encourages a focus on getting as many core supporters to the polls as possible.

As we've seen, the internet absolutely excels at maintaining connections with individual voters and at energizing them to recruit their friends, donate their money and volunteer their time. The 2010 elections won't be determined by the internet alone (candidates and ideas do matter!), but campaigns that employ online strategies intelligently and with real-world goals in mind should have a significant edge over their rivals, particularly in tight races.

This is a year in which state- and local-level politics will matter. Not only will the new Congress help determine the fate of Barack Obama's remaining political agenda, but the state legislators who take their seats in 2011 will redraw political districts across the country, a process destined to shape our political landscape for a decade to come. Now that you've read this guide, YOU have the tools to influence how those elections turn out.

And if you need help, let's chat.

A Basic Online Oureach Plan

Now that we understand the essential tools and tactics of online political organizing, let's put them together into a coherent plan to win an election.

Phase One: Getting Established

At the start, campaigns need to focus on getting the basics right, a process that may take from a few days to a few weeks. The initial steps:

- Begin monitoring the race; set up Google Alerts on the candidate and opponent.
- Build and launch website with integrated supporter signup/CRM/fundraising system
- Establish Facebook (and MySpace?) profiles and connect with local political activists.
- Establish YouTube channel with initial content (even if only a single clip).
- Establish Twitter account and blog, if campaign will be using either or both.
- Identify relevant (usually local) political blogs based on audience and topic.
- Identify other prominent online voices, including Twitterers, videobloggers and frequent commenters on local political sites.

Phase Two: Feeding the Beast

With an infrastructure in place, a campaign moves into the long middle period between the candidate's announcement and the actual voting. List-building and fundraising will be usually be the highest priority, supported by outreach and content creation.

- Integrate website promo into all print materials and broadcast advertising.
- Recruit new supporters/list members at in-person events.
- Begin online advertising, particularly on Google but also on blogs and local media sites.
- Begin comprehensive email-based online fundraising via CRM.
- Solicit and organize supporters' volunteer time, also via CRM but possibly through custom social network.
- Expand/improve campaign website content.
- Expand connections on social networking websites and Twitter; post new content regularly.
- Encourage supporters to spread the word and recruit friends through their online and offline channels.
- Post additional online videos to YouTube profile and campaign website as needed and as available

- Build relationships with local bloggers, Twitterers and other online influentials, with an eye to pitching stories and arranging opportunities to speak directly to their audiences.
- Continue monitoring independent online content posted about the race; respond as necessary and able.

Phase Three: Run-Up to Election Day

Once an election is close, an online campaign will shift into full mobilization mode.

- Begin final push for volunteer involvement, including block-walking and phonebanking.
- Begin early/absentee voting push, if applicable.
- Send final fundraising appeals.
- Encourage last-minute supporter online evangelism on Facebook, personal email, etc.
- Ramp up email campaign intensity via CRM to support all of the above activities.
- Online advertising may switch to encouraging early voting and connecting people with polling places.
- On Election Day, send final appeals via email, social networking outlets, text messaging, campaign website, Twitter and other channels. Hope for the best.
- After the election, send follow-up message to supporters.

For More Information

Other Guides from E.politics

- Online Politics 101
- Learning from Obama: Lessons for Online Communicators in 2009 and Beyond

Related Articles

- Bob McDonnell's Impressive Online Campaign for Virginia Governor
- Learn from this City Council Candidate
- Video: Applying Obama Online Lessons to State, Local and Advocacy Campaigns

- Ten Ways to Blow It Online in 2010

- Inside the Obama Numbers: Tiers of Engagement

- Two-Thirds of Obama's Online Fundraising was Via Email

- Reaching the "Network Influentials"

- Content was Key (and Overlooked) Part of Obama's Online Juggernaut

- An Internet Politics Index to David Plouffe's The Audacity to Win

- The Enduring Value of the Online Communications Tripod

- Digital-Age Media Relations: Pitching Stories in a Challenging News Environment

- What a Modern Communications Team Looks Like

- Measuring the Effects of Social Media Marketing

- Ten Rules for Blogger Outreach

- Targeted Facebook Ads Aren't Just for Big Political Campaigns

- You've Got a Friend in Barack Obama: Integrating Social Networking Tools into Political Campaigns

- The Enduring Power of Small Online Donors

- Obama Campaign Saw "Ridiculously" High ROI from Google Ads

- Getting the Most Out of Google Ads and Other Pay-Per-Click Advertising Campaigns

- Online Politics is Usually Trench Warfare, Not Blitzkrieg

- An Impending Explosion of State-Level Online Politics?

- Why State-Level Online Politics Really Matters in 2010

- Online Social Networks in Politics: Promise, Frustration and…

- Twitter is NOT a Strategy

- Creating Effective Political Video for the Web

- Social Media for Elected Officials

- If You Want to Change Congress, Fund Challengers' Staff Early

- Obama Campaign's New Media Staff was NOT a Part of the Tech Team

- David Plouffe: The Obama Campaign Used Grassroots Data and Computer Modeling to Allocate Resources in Real Time

- Illuminating the Presidential Campaigns' Internet-Driven Ground Game

- [After the Debates: Using the Internet to Win at the Water Cooler](#)

- [Obama Email Pushes Voter Registration](#)

- [Obama's Texting for Turnout during the Potomac Primary](#)

- [Checking In On Presidential Online Advertising, Pre-Indiana and NC](#)

- [Citizen 2008: Using the Internet for Individual Political Advocacy in the Elections and Beyond](#)

- [Don't Copy this Al Gore Email](#)

- [Prop 8 Battle Shows that the Left has No Monopoly on Internet Activism](#)

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About The Author

Colin Delany is founder and chief editor of *Epolitics.com*, a website that focuses on the tools and tactics of Internet politics and online political advocacy. *Epolitics.com* received the Golden Dot Award as "Best Blog - National Politics" at the 2007 Politics Online Conference, and Delany participated in DC Fox affiliate WTTG-25's live coverage of the 2008 general election night. Delany is also the author of the e-book *"Online Politics 101: The Tools and Tactics of Online Political Advocacy,"* which has been downloaded from epolitics.com over 50,000 times, as well as the more recent *"Learning from Obama: Lessons for Online Communicators in 2009 and Beyond."*

Delany started in politics in the early '90s in the Texas Capitol (where public service is considered a contact sport) and moved into the online political world in 1995. In 1999, during the first internet boom, he helped to start a targeted search engine for politics and policy, which lasted about as long as such ideas usually do. Since then, Delany has worked as a consultant to help dozens of political advocacy campaigns promote themselves in the digital world, and between 2003 and 2007 was the Online Communications Manager at the National Environmental Trust. He also plays bass in a rock and roll band.

Find out more about consulting services from Colin Delany, or contact him at cpd@epolitics.com to arrange a training, webinar or presentation.