

A network diagram with several central nodes connected to multiple peripheral nodes by thin lines, set against a dark blue background.

HOW TO USE THE INTERNET TO

# CHANGE THE WORLD

AND WIN ELECTIONS

A COMPREHENSIVE GUIDE TO DIGITAL POLITICS  
FOR CAMPAIGNS, ADVOCATES & ACTIVISTS

2023 EDITION

A grayscale photograph of a large crowd of people at a protest, holding various signs. Some visible signs include "BLACK LIVES MATTER", "FUND OUR SCHOOLS", and "NO JUSTICE NO PEACE".

COLIN DELANY  
epolitics.com

# About This Book

---

## **How to Use the Internet to Change the World - and Win Elections [2023 Edition]**

By Colin Delany

### **Version 10.0**

April 2023

This edition incorporates ideas from earlier Epolitics.com guides published in 2010, 2012, 2014, 2016, 2018, 2019, 2020, 2021 and 2022. The 2023 version includes lessons from the 2022 U.S. midterm elections and the response to the coronavirus pandemic. The document in your hands (real or virtual) is current as of the middle of April 2023.

Note: if someone forwarded you a copy of this book and you found it useful, please go to [Epolitics.com/Winning](https://epolitics.com/Winning) and buy a copy to help offset the time and experience that went into creating it. Thank you!

Copyright 2023 Colin Delany

Version 1.0 published 2010

Version 2.0 published 2012

Version 3.0 published 2014

Version 4.0 published July 2015

Version 4.1 published January 2016

Version 5.0 published July 2018

Version 6.0 published April 2019

Version 7.0 published June 2020

Version 8.0 published January 2021

Version 9.0 published August 2022

Version 10.0 published April 2023

[Bottom cover photo by Stan Wiechers](#)

# Table of Contents

---

*For links to each chapter and its subtopics, please turn on the Navigation pane of your PDF reader and look for Bookmarks.*

<b>Introduction: How to Use the Internet to Change the World — and Win Elections....</b>	<b>4</b>
<b>The Internet: What's It Good For?....</b>	<b>7</b>
<b>A Sample Online Plan for a Political Campaign....</b>	<b>14</b>
<b>Planning Your Campaign Strategy....</b>	<b>17</b>
<b>Essential Tools and Infrastructure, Part One: Websites, Mass Email and Supporter Databases....</b>	<b>22</b>
<b>Essential Tools and Infrastructure, Part Two: Social Media, Video, Mobile and Monitoring....</b>	<b>32</b>
<b>Preparing Your Recruiting, Outreach and List-Building Strategy....</b>	<b>39</b>
<b>Online Advertising....</b>	<b>47</b>
<b>Social Media Marketing....</b>	<b>59</b>
<b>Facebook....</b>	<b>65</b>
<b>Twitter....</b>	<b>84</b>
<b>Data-Driven Grassroots and Field Organizing....</b>	<b>93</b>
<b>Mobilization and GOTV....</b>	<b>99</b>
<b>Online Fundraising....</b>	<b>104</b>
<b>Data and Analytics....</b>	<b>113</b>
<b>Logistics, Budget and Staffing....</b>	<b>121</b>
<b>Big Digital Politics Trends to Watch in 2023 and Beyond....</b>	<b>126</b>
<b>Conclusion....</b>	<b>133</b>
<b>About the Author....</b>	<b>135</b>
<b>Appendix: Political Campaigning &amp; Political Advocacy During the Coronavirus Pandemic....</b>	<b>137</b>

# Introduction: How to Use the Internet to Change the World — and Win Elections

**Version 10.0: April 2023**

*"Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat." — Sun Tzu*

Let's change the world. But how? Here's an idea: take advantage of the phones in our pockets and the computers in our laps. A wise choice! The internet gives ANYONE — candidates, advocacy organizations, corporate interests and everyday citizens alike — powerful tools to shape policy, influence elections and shift the direction of public discourse.

This guide is designed to provide you the practical knowledge you need to put social media, online advertising, online fundraising, political data, email, websites and other internet-enabled tools and techniques to work for YOUR campaign or cause. I wrote it with this year's American political climate in mind, but most of the lessons apply to political and advocacy campaigns around the world. Let's get started.

## The Context: U.S. Politics in 2023

For many in the U.S. political campaign world, 2023 will be a year to build. A few states will elect new legislators and statewide officials, but federal offices won't be on ballot except in rare circumstances that require a special election. Regardless, whether they're preparing for next year or they're in the fight of their lives right now, political campaigns, advocacy organizations and individual activists will surely rely on the tools and tactics described in this book to fuel their work.

National political dynamics will loom large for some of the candidates still running for office this year, but plenty of political races will buck the national trends, hinging on local issues and local personalities. Some political fights will be entirely independent of campaigns for office: they'll revolve around issues, organizations and initiatives, not candidates. Around the world, [citizens are restless](#), and traditional political actors risk being upstaged by the people they usually seek to influence and govern. Meanwhile, new technologies like [artificial intelligence](#) promise to change the way we create content and analyze data, though they may create opportunities for disinformation and political disruption. It's on us to make sure that the tools work to our collective benefit, not our hard regret.

Twenty years ago, political communications depended on television, but we live in 2023 and the world has changed. From [Ankara](#) to [Alabama](#), the internet has become an integral part of the political battlefield, and has been for quite a while. Smart campaigns from Senate to city council will integrate digital tools into their plans to contact, persuade and mobilize voters. Activists will do the same, whether they're fighting for democracy or for a little clean water. More than at any time in history, everyday people have the power to change the world. How will YOU use it?

## About This Book

This book is designed to show you how to put digital tools to work to give yourself the best chance of winning in politics in 2023 and beyond. Simple, eh? Actually, much of the technology IS simple: even my Mom has figured out Facebook (mostly). The trick is using it RIGHT, since the playing field is dotted with rabbit holes ready to swallow your time. For one thing, many internet technologies that LOOK sexy don't actually do much to turn out the vote or move an issue.

In the pages to come, we'll concentrate on a very practical approach to digital politics, operating under the assumption that you want to win. We'll discuss:

- The Internet: What's It Good For?
- Planning Your Online Campaign
- Essential Tools and Infrastructure
- Preparing an Online Outreach Strategy
- Social Media
- Online Advertising
- Grassroots/Field
- Mobilization and GOTV
- Online Fundraising
- Data and Analytics
- Logistics, Budget and Staffing
- Big Trends to Watch in 2023
- Political Campaigning & Advocacy During a Pandemic

Along the way, we'll talk about ways in which the various digital tools integrate with each other and with all the rest of a campaign's communications and outreach. By the end, you should understand the strengths and weaknesses of each technology, how the strengths of one can offset the weaknesses of another, and how online and real-world politics intersect in a modern campaign. Pretty cool.

## Keeping Up With the Latest

Internet politics moves fast, and even a book as current as this one will start to go out of date as soon as it's published. But you can keep up with the latest developments at [Epolitics.com](https://epolitics.com), which has just relaunched after a sabbatical and is in its SEVENTEENTH year of tracking digital politics as I write these words. Swing by regularly to see what's changing...and what isn't.

## Oh No, Not Me!

Right now you may be saying to yourself, "this internet stuff sounds cool, but it doesn't work for MY district/country/cause." My answer? Keep on thinking that, and you might just get your butt whipped by someone who thinks differently. In the United States, internet access has reached into almost every community, at least via cell phone, and the vast majority of us now use websites, social media and email to some extent in their everyday lives. Around the world, mobile phones are ubiquitous and smart phones soon will be.

Not surprisingly, people employ these same digital channels when they turn to politics: voters hit the web and social media to learn more about candidates and issues, to sign up for events, to [show their support or opposition in public](#), and (of course) to give money. YOU want YOUR campaign to be the one that's tapping the enthusiasm, time and cash of constituents-to-be...and possibly, the enthusiasm of activists and donors across the country.

But what's the internet REALLY good for? In the next chapter, we'll see. Get ready to change the world.

## 2. The Internet: What's It Good For?

---

Sure, the internet brought us the glory of unlimited kitten videos, but what's it done for us lately? In the political world, quite a lot — and more every election cycle. Let us count the ways.

### The Big Picture

Political campaigns usually exist to do one thing: win on Election Day. Elections are a zero-sum game — somebody wins, somebody loses, and except in very rare circumstances, there ain't no middle ground. Advocacy campaigns can play a longer game, but they still need to work toward something that resembles victory in the end.

To win in 2023 and beyond, most campaigns will need to carry out three basic tasks online:

- Recruiting — forming a connection with volunteers, donors and potential voters.
- Mobilizing — getting these supporters to do something, whether to give money, phone-bank, share content, canvass or simply turn out and vote.
- Messaging — getting the campaign's political messages out to the right audiences, whether a broad swath (all voters in a district) or a narrow one (journalists, bloggers, Latinos over 40, women under 30, union members, Trump-voting gun-toting union members, etc.).

Any time you're evaluating a technological solution, ask yourself whether or not it helps you achieve one of those goals. Everything a campaign does — **everything** — has a cost, even if that cost is a few minutes of a staff member's time. Successful campaigns will be ruthless when it comes to scarce resources like minutes and money.

So when someone says, "Hey, we should be on TikTok," the first question a campaign manager should ask is whether or not it would help in any significant way with recruiting, mobilization or messaging — and ultimately, whether it'll help you win.

**This calculus applies to every tool and tactic we'll discuss in this book. If it ain't worth it, don't do it.** That is, if you want to win.

### Fundraising

As [Barack Obama's 2008](#) and [2012 campaigns](#) showed, an online army can be a powerful source of funds. Obama raised over half a billion dollars online in '08 alone, two-thirds of it directly from someone clicking the "donate" button in a campaign email. 2012 saw the two presidential campaigns together pull in more than a billion dollars online. In the years since, even local campaigns and small nonprofits have found online fundraising to be an effective way to gather cash. In 2016, the Trump team was the first to really [crack the nut of social media fundraising](#). In 2020, grassroots Democrats

donated vast amounts of cash to down-ballot candidates and Joe Biden alike, albeit [with mixed success](#). Once again, grassroots money flowed in abundance in the 2022 midterms, [something likely to continue into 2023's off-off-year races](#). Building a base of repeat online donors will be a prime goal for many readers of this book.

**The Challenge:** assembling an army of online donors and motivating them to give again and again.

## Recruiting

Online tools provide great ways to connect with donors, volunteers and voters. Even when supporters interact with your campaign in person, you can communicate with them afterwards via email, social media and text message to put them on the path to giving money and time. Crucially, social media lets your supporters do the campaigning for you: fire them up and arm them with messaging, imagery and videos, and they'll spread the word via Facebook, Twitter, Instagram, SnapChat, TikTok and every other channel they use.

**The Challenge:** identifying the group(s) you need to reach, the effective channels to reach them and the content and messaging that will entice them.

## Mobilization

More broadly, online tools are great for encouraging supporters to get involved: canvass their neighbors, contact friends and family, participate in "virtual phone-banks," vote on slogans or video ads and even speak in public on the campaign's behalf. Though many of these "asks" will be relayed via social media, email has been king of mobilization for a couple of decades — people are far more likely to act on an appeal delivered via your email list than one posted on Facebook (even if the ask is actually to [share something on Facebook](#)). Texting is catching up fast, particularly for field organizing, but for now at least, it's hard to fit much more than a call to action into a single message.

**The Challenge:** building a base of supporters willing to act on your behalf, then finding the content, messaging and channels to get them moving.





- Apr 22** **Team Warren CNN Town Hall Watch Party**  
Tomorrow 7:45 PM · To Share Brewing Company · Manch...  
Causes · 247 people
  
- Apr 23** **Columbia Student Organizing Event with Eliza...**  
Tue 10:15 AM · Allen University · Columbia, South Carolina  
Causes · 137 people
  
- Apr 26** **Tipton Meet & Greet with Elizabeth Warren**  
Fri 11 AM CDT  
Causes

**A list of upcoming events on Elizabeth Warren's Facebook page during the 2020 presidential race**

## Grassroots Organizing

Digital tools — particularly mobile ones — play in the world of grassroots organizing in a big way. Most campaigns use phone and tablet apps to ease the process of recruiting people and taking donations (via mobile credit card readers) in person. Mobile apps and mobile-optimized websites deliver addresses, maps, directions, videos and talking points to canvassers' phones. Sophisticated campaigns will create a system to use [data analysis to target their grassroots outreach and optimize it](#) over time.

**The Challenge:** building a grassroots campaign structure that can scale to match your plans, then directing it at the right people at the right times.

## Advertising and Messaging

Facebook, YouTube, Google and a plethora of online properties offer campaigns and advocates the opportunity to reach a huge array of voters and opinion-leaders, particularly if they pay for the privilege. Organic outreach plays a role, but communications at scale and targeted to specific demographic groups or to lists of individual voters usually involves advertising. Smart campaigns will employ an integrated mix of paid, organic and personal outreach to build relationships, influence the digital conversation and change minds. An ongoing consideration in 2023: constantly changing rules for political advertising on Facebook, Google, Twitter and other platforms, including disclosure,

targeting restrictions and outright bans. New in 2023? AI-powered chatbots that can help us [create vast amounts of content](#)...which may or may not reflect the real world.

**The Challenge:** choosing the right advertising and outreach channels and investing your time and money wisely.

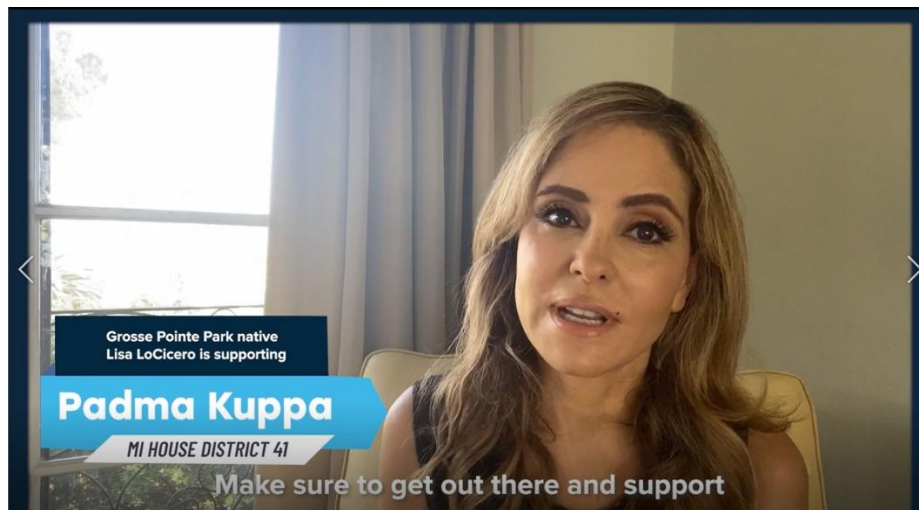


**Dueling Trump and Biden campaign Facebook videos from May of 2020. Coronavirus didn't just change how campaigns did business; it became a serious issue in the presidential campaign itself.**

## Influencer Outreach

Campaigns can connect directly with reporters, bloggers and online activists one-on-one behind the scenes. Online publishing tools have created [an entirely new class](#) of [influencers](#) who've built an online following. Persuading them to support your campaign or cause can help you tap into their communities and bring in fresh attention and new recruits. [Some campaigns will pay for the privilege](#), but an enthusiastic influencer is likely to be more effective than someone just in it for the bucks.

**The Challenge:** identifying the appropriate influencers, finding the right channels to reach them, motivating them to get on board and getting them to follow through.



A video featuring actress Lisa LoCicero aimed at voters in her hometown. I ran this video both as a programmatic ad and as a Facebook ad for [The Hometown Project](#) to support a state-legislative candidate in 2020

## Testing

The internet doesn't just deliver messages: it can also tell you whether they work. Online advertising, email and social media naturally lend themselves to the testing of positions, slogans, taglines and visuals. At a basic level, a campaign can run clusters of ads to see which versions attract clicks from potential donors and volunteers. Likewise, sending different variants of an email message to a test audience can identify the best one before going to the full list. In 2012, the Obama campaign sometimes found that subject line A/B testing helped them double the amount of money a given fundraising email blast produced. In 2016, the Trump campaign [automated Facebook message-testing, engagement and recruiting](#) on a vast scale. By 2023, A/B testing is standard procedure for just about any online communicator with the resources to invest in it, and ad managers are [turning to AI](#) to generate even MORE content to put into the mix.

**The Challenge:** learning to integrate testing into your day-to-day operations; turning your new knowledge into results on the ground.

## Geographic Targeting

Top-level presidential candidates seem to get media attention every time they open their mouths, but state and local campaigns usually struggle to get covered at all — unless they screw up royally and publicly. 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 in the U.S., for instance, broadcast TV advertising is impractical for many campaigns, since too many spots will be wasted on viewers outside district lines. By contrast, online (and online-enabled field) outreach can usually be targeted demographically and geographically, letting you hit the right voters cost-effectively.

**The Challenge:** understanding your targeting options and choosing the right groups to reach with the right messages through the right channels.

## Rapid Response

Finally, campaigns will use the internet to [push back against attacks and unfavorable coverage](#), using online channels to go around traditional gatekeepers (like journalists) to reach voters and influencers directly. Fast and effective response tools include online ads (including Google ads related to searches for the story), videos, blog posts and social media content. Don't forget to send an email or text to supporters asking them to help and encouraging them to share the resources you've prepared. Unfortunately, while lies spread wildly person-to-person, on cable news, via [podcasts](#) and more, the tech platforms' political ad restrictions may [hobble your attempts](#) to push back against them.

**The Challenge:** knowing when and how to respond, plus being fast enough to move effectively in a minute-by-minute communications cycle.



**Hillary Clinton rapid response Facebook video from the fall of 2016. Note: almost four years earlier than the Biden video above, but the same Trumpian facial expression.**

## Getting Started

Next, we'll look at a sample plan for a digital campaign.

## 3. A Sample Digital Plan for a 2023 Political Campaign

---

Let's put digital tools to work to help win an election in a sample campaign in the United States this year. Campaigns in other places in the world may not be able to deploy exactly the same tools and tactics, but the basic concepts will often apply.

### Phase One: Getting Established

First, [campaigns need to focus on getting the basics right](#). The setup process may take from a few days to a few weeks, and generally a campaign should start its digital side rolling as early as resources and circumstances allow. For a presidential race, this stage would usually have taken place at least a year before the first primaries. Down-ballot campaigns are likely to get a later start, taking these steps within a few months of a contested election. The initial steps:

- Begin monitoring the race; run online searches on candidate and likely opponents. Likewise, set up Google Alerts on the candidate and opponents.
- Set up and launch website and supporter signup/CRM/mass email/fundraising system.
- Establish Facebook page, Instagram feed and Twitter account.
- Establish YouTube channel, even if the only content is your announcement video.
- Establish other social media channels if appropriate.
- Run Google and Facebook ads to build name recognition and the campaign's list, spending at least a few dollars per day at first.
- Encourage friends and family, plus local political activists, to follow your digital channels.
- Identify relevant (perhaps local or statewide) political blogs and other online communities.
- Identify other prominent online voices, including bloggers, activists active on Twitter or Instagram or TikTok, and frequent commenters on local political or news sites, with an eye toward recruiting them to support the campaign.
- Build your email list.
- Start raising money via email.
- Identify grassroots tech (such as peer-to-peer and relational organizing apps) for use by field staff/volunteers.
- Begin the process of recruiting and training volunteers.

## Phase Two: Feeding the Beast

In the middle period between the candidate's announcement and the actual voting, list-building, most campaigns spend their time building relationships and raising money. Name recognition does not hurt, either.

- Promote the campaign website (or QR code) in all print materials and broadcast advertising.
- Continue recruiting donors and volunteers via online ads, particularly on Google and Facebook/Instagram but possibly on other social-media channels, blogs and local media sites. Employ voter-file-targeted video ads and banner ads to reach specific voter segments, but [don't forget the need to influence opinion broadly](#) as well.
- Sign up new supporters for the email list, volunteer list and social channels at in-person events.
- Organize supporters' volunteer time via grassroots management tools.
- Canvass voters in person, over the phone or via text message to identify persuadable contacts as well as likely supporters.
- Run digital ads (social media or programmatic) targeting specific voters in the days before those voters are to be contacted by field canvassers.
- Grow Facebook community and Twitter/Instagram followings; post new content on these channels regularly, featuring supporters and volunteers when possible.
- Expand/improve campaign website content.
- Post videos to YouTube, Facebook and Instagram and embed on the campaign website. Post on TikTok if the campaign has a presence on the platform.
- Routinely use your digital channels to encourage supporters to tell friends and family about your campaign.
- Continue monitoring independent online content posted about the race; respond as necessary and able.
- Begin grassroots canvassing operation, facilitated by data analytics and mobile technology if possible and appropriate.
- Raise more money.

## Phase Three: Run-Up to Election Day

Time for full mobilization! This phase typically begins between one and two months before Election Day, with a push at the start of early voting.

- Begin final field-organizing campaign, including canvassing and virtual phonebanking.

- Organize volunteer teams for turnout operation, including via peer-to-peer text messages and relational apps.
- Begin early/absentee voting push.
- Send more fundraising appeals, stressing the urgency of the race.
- Encourage last-minute supporter evangelism via Facebook, Twitter, Instagram, TikTok, personal text, etc.
- Ramp up email campaign intensity to support all of the above activities.
- Digital ads usually focus on turning out the faithful at this stage, but ads they may also build name recognition among likely voters or try to persuade suspected fence-sitters.

## Final Push

- Field organizers emphasize voter turnout among targeted demographics and communities.
- Online ads continue the mix of turnout-boosting, name-recognition and persuasion. Data-driven ad targeting helps reach voters the campaign needs for GOTV. Geotargeted mobile ads may reach voters in line at the polls.
- Email/Facebook/Instagram/Twitter program encourages last-minute donations.
- Email/Facebook/Instagram/Twitter program pushes voter turnout, with an emphasis on tell-your-friends asks and encouraging people to make specific plans to get to the polls.
- On Election Day, send final appeals via email, social networking outlets, text messaging, campaign website, Twitter, telegraph, semaphore, smoke signal and all other available channels. Field teams get people to the polls. Hope for the best.
- Have a drink.
- Win or lose, send a follow-up message to supporters, particularly if you plan to remain in public life.



## 4. Planning Your Campaign Strategy

Now that we've seen a basic campaign plan, let's start making our own.

### Identify Your Goals

It sounds like Communications 101, but first you need to define your goals as clearly and specifically as possible. If you don't know where you're going, you can't draw a clear path to get there.

If you're an electoral campaign, your goal is almost always to win. Even then, other goals may come into play. You may not have a chance in this particular election, but perhaps you're raising the candidate's profile and preparing the ground for a subsequent race. Or, you're an awareness-raising campaign, using the election to bring attention to a particular set of issues.

If you're an advocacy campaign, you may have more diffuse goals. You're likely trying to change public policy, but the route may involve many twists and interim steps. For instance, if you want to pass a tax-policy bill in your state, you may need to think in terms of several legislative sessions before you achieve victory. For each meeting of the legislature, you'll have immediate goals that may not lead to instant victory but that help advance your cause materially.



**Andrew Yang presidential campaign video, April 2019. Yang benefited from a wave of online support early in the 2020 cycle but couldn't find a viable path to the nomination.**

## Set Specific Interim Goals

Even if the ultimate end of your campaign is straightforward (ex: elect Bob Dobbs mayor of Slackville) you should be as specific and concrete as possible when drawing up the steps to get there. For instance, you might need to:

- Raise turnout among the Latino community in your district by 5% over the last comparable election
- Increase your share among voters 60 years old and up by 10%
- Increase the turnout in your home county by 3%
- Win in excess of 60% among union households in your district
- Raise \$500,000 from online-only donors before Election Day
- Increase name recognition by 50% among likely voters in the district

If your campaign is advocating a policy change rather than electing a candidate, you might need to:

- Assemble a coalition of 20 like-minded organizations with a grassroots presence in your state
- Build a grassroots list of 500,000 voters in your state
- Get 100,000 registered voters to contact their state legislators on behalf of your issue
- Generate 50 stories favorable to your issue in state-focused media outlets and political blogs

The specific goals you set will depend on your strengths, weaknesses and opportunities, as we'll discuss below.



**In a single tweet, Jay Inslee leverages a video of a TV appearance, highlights his main campaign issue and asks for money**

## Create Interim Milestones

As you identify intermediate steps to get you to your end goals, create milestones as concrete and specific as possible. For instance, if one of your goals is to raise \$500,000 from a small-donor email list, your interim goals might be:

1. Recruit 50,000 email list members by X date
2. To do so, recruit 5500 list members every month, if you're aiming for a date 10 months away. Math-savvy readers will note that 5500 is 10% more than you need to achieve your goal, but lists always suffer attrition over time and you'll need to account for it
3. Convert 10% of list members into donors (5000 donors) by Y date
4. Raise an average of \$100 from each donor

Experienced online fundraisers will recognize these as ambitious goals, but they're specific — and if you find yourself falling behind during any month, you'll know it.

## Know Thyself: Identify Your Strengths and Weaknesses

Once you've established your goals, you can start thinking about how to get there. Step One is to understand your own strengths and weaknesses intimately. For instance, for an electoral campaign:

1. Strength: you have name recognition in the district.
2. Weakness: you don't. Or, you have name recognition but a negative way.
3. Strength: the local political establishment supports you.
4. Weakness: they support one of your opponents.
5. Strength: you have a ton of money.
6. Weakness: you don't.
7. Strength: you have support among voters who turn out regularly.
8. Weakness: you have support among a large number of potential voters, but they can't be trusted to turn out on their own.
9. Strength: you have grassroots enthusiasm on your side.
10. Weakness: people know you, but their support is tepid.

For an advocacy campaign, the equation may be less binary:

1. Strength: your policy experts are the best
2. Weakness: you have no grassroots base

3. Strength: you have a robust array of partner organizations in the same fight
4. Weakness: the local political media is biased against you and won't give you a break
5. Strength: you have money behind you
6. Weakness: you're broke

In each case, you may be able to turn a weakness into a potential source of strength. For instance, if you're running an insurgent campaign, opposition from the media or the Establishment may feed into an underdog narrative, helping you rally support from key constituencies (see: Sanders, Bernie and Trump, Donald).

Likewise, some strengths will offset other weaknesses. If you're a wonky policy organization with great issue experts but no grassroots base, you can try to team up with like-minded folks who ARE organizing in the right communities. You provide the policy smarts, they provide the people. Both of you are stronger as a result.

Wise campaigns build on their strengths and use them to offset their weaknesses. They also try to minimize the effect of those weaknesses. No grassroots support, for instance? Most campaigns can still find at least SOME supporters willing to help out on the ground, helping to turn a major handicap into something less serious. Likewise, if the local political Establishment is against you, can you peel off at least SOME big-name support? Look for even small opportunities to blunt the edge of your opponents' most powerful weapons.

You can also tackle potential weaknesses head-on. In 2012, President Obama's supporters included a lot of people who didn't turn out to vote regularly, particularly young people and lower-income minority voters. Instead of abandoning them, his campaign created a [comprehensive, data-driven field operation](#) to identify, locate and contact the voters he needed one-by-one. The result? Solid turnout and big margins among the targeted voters. Democrats used a similar approach [to win statewide races](#) in Virginia in 2013, showing that this model can be repeated. Too bad Virginia Dems [seem to have forgotten all about it by 2021](#).

## Know the Ground

Also vital to fully understanding yourself and your situation? Understanding the ground you're standing on. For instance:

- What's the scale of the fight? Hyper-local? Statewide? National? If you're local, in-person politics will often dominate. At the national level, that's harder to achieve, unless you can tap a massive, Obama-style grassroots army.
- More specifically, if you're running for office, is it an open seat or one occupied by an incumbent? Have the district lines been redrawn recently?
- Who else is in the race? What communities do they represent?
- What local groups will be active? What outside groups?

- Who are your natural allies and enemies? Which ones could be flipped, either by you or someone else?
- Are the demographics of the district changing? If so, is the change reflected at the polls, or is it a nascent trend waiting to be tapped by the right candidate or issue?

For advocacy groups, the considerations are related but likely to be different in their specifics. The basic rule still stands, though: if you don't understand your unique circumstances, you're not likely to craft a plan that gives you the best chance to win.

## **Strategy Rule #1: Match the Tools and Tactics You Choose to Your Strengths and Weaknesses**

**Most of the rest of this book will be dedicated to examining the potential of each tool and tactic, to help you make the best decisions about which to use — and when.**

### **Plan vs. Reality**

Of course, no plan will survive contact with reality. Between unanticipated events and your opponents trying to monkey with your wrench, SOMETHING's going to go wrong.

But don't throw your plan out the window just because the zombie apocalypse is on its way. Instead, think about how you can tweak your strategy to match the circumstances. Otherwise, you're likely to find yourself running around in circles, reacting to every gust of wind rather than trying to bend the weather to your favor. Stay cool — and adapt.

### **Getting Down to Brass Tacks**

Next: a deeper dive into the essential digital infrastructure most campaigns will need to build to put all their strategizing to work.

## 5. Essential Tools and Infrastructure, Part One: Websites, Mass Email and Supporter Databases



Let's create a firm foundation for our online campaign. For context, most of what we do in a digital campaign basically recreates a classic political act in digital form. For example, a website is the electronic version of a storefront office, and the process of [working with online influencers](#) is a lot like pitching reporters on a story.



### **Modern politicians still kiss babies, but now they post about it on Facebook**

Compared with traditional political tools, the internet truly excels at maintaining relationships with many people at once. Channels like Facebook, Instagram, Twitter, YouTube, TikTok and email connect directly with your donors and volunteers. They provide easy paths to spread news, talking points, event invitations and appeals for time and money. With planning and effort, the connection can go both ways, letting a campaign actively tap [supporters' social connections and even their creativity](#).

Political professionals trained in the broadcast era sometimes have trouble wrapping their heads around the back-and-forth nature of the internet (TV ads aren't exactly interactive). But the rewards for embracing it can be tremendous: as [Barack Obama showed](#) repeatedly, campaigns that actively engage their supporters can ask an immense amount from them in return.

 **National Nurses United** ✓  
about 6 months ago 

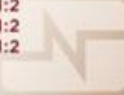
Great news! Five more legislators co-sponsored our bill that would establish national minimum RN-to-patient ratios for every hospital unit at all times.

Thanks [Congressman Steve Cohen \(D-TN\)](#), [James P. McGovern \(D-MA\)](#), [Congressman Juan Vargas \(D-CA\)](#), [Congressman Adriano Espaillat \(D-NY\)](#) and [Congresswoman Frederica Wilson \(D-FL\)](#)!

Learn more about this life-saving legislation here:  
<https://www.nationalnursesunited.org/ratios>

## PROPOSED FEDERAL RN RATIOS

Intensive/Critical Care 1:2	Pediatrics 1:3	Other Specialty 1:4
Neonatal Intensive Care 1:2	Emergency Room 1:3	Care Units
Operating Room 1:1	Trauma Patient in ER 1:1	Psychiatric 1:4
<small>plus at least one additional scrub assistant</small>	ICU Patient in ER 1:2	Rehabilitation 1:5
Post-anesthesia 1:2	Step Down 1:3	Skilled Nursing 1:5
Labor and Delivery 1:2	Telemetry 1:3	Facility
Antepartum 1:3	Medical/Surgical 1:4	
Combined Labor and 1:3	Coronary Care 1:2	
Delivery, and Postpartum	Acute Respiratory Care 1:2	
Well Baby Nursery 1:6	Burn Unit 1:2	
Postpartum Couplets 1:3		
Intermediate Care Nursery 1:4		

 **National Nurses United**

NATIONALNURSESUNITED.ORG

**National Campaign for Safe RN-to-Patient Staffing Ratios**

RNs across the United States are actively working with CNA/NUU to win t...

Connecting supporters to the legislative advocacy process via social media. Note that the post includes a link and tags the Facebook pages of the legislators it's praising. Tagging them should alert the congressmembers' social media staff, who can tell the boss and/or share the post from their own pages.

## The Essential Infrastructure of an Online Campaign

### Websites

Except in the rare case that a Facebook page or Instagram feed will do, just about every political or advocacy campaign needs a website if it intends to use the internet at all. Besides serving as your public front, a campaign site's main job is to help build a supporter list. This means that no visitor to your site should leave without an opportunity to join your list and turn an instant of enthusiasm into the potential for real-world action.

The first thing most people will notice when they arrive on your site will be its appearance, and a well-designed layout can help make a good first impression. A good design also steers the reader's eye toward essential tasks like donating and joining your list. Most voters, bloggers and journalists visit your site for substance, though, not looks — they want to know who you are and what you stand for. When it comes to the process of winning them over, [content is key](#), as we'll discuss repeatedly in the

chapters to come. In the 2016 election cycle, presidential campaigns were even [optimizing their humble "404/File Not Found" pages for conversion](#), a trend that [continued into 2020](#).



I kid you not, this photo graced [Martin O'Malley's 404 page](#) in June 2015

### A Place to Make Your Case

A website lets you present your campaign's case in the strongest possible way, telling your tale through things like:

- Words
- Photos
- Video
- Stories
- Numbers
- Infographics

Be sure to integrate your site with other aspects of your online outreach: the site will be stronger when it gathers, organizes and features content from YouTube, Twitter, Facebook and the various other facets of your online presence. **Think of the site as a hub around which the rest of your outreach orbits.** Another consideration: good content also serves as "Google bait," helping your website and other channels rank higher in search engines.

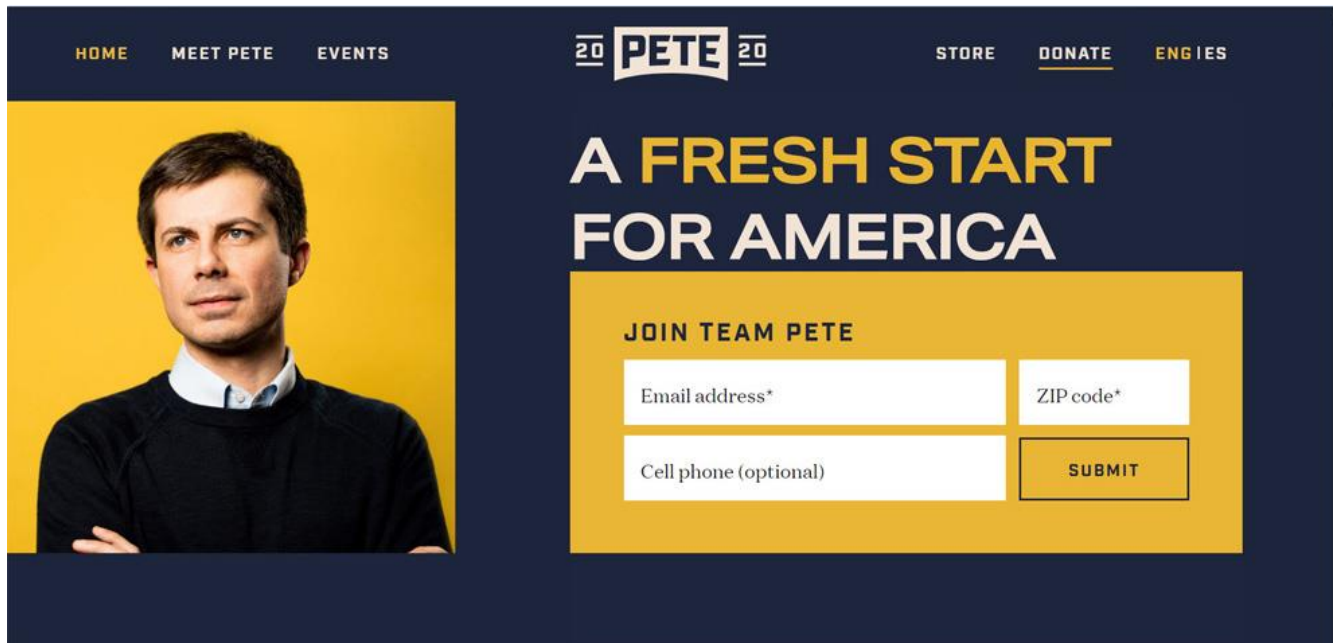
Completing the connection, every scattered piece of content should refer back to the main website — people shouldn't be able to encounter you anywhere (whether on Google, YouTube, a blog post or an online ad) without finding a way to get involved. **Online content doesn't just persuade, it recruits.**



## Make It Easy to Use

Of course, even the best content is useless if it's hard to find or consume, so a campaign website needs to have straightforward navigation buttons, with sections clearly labeled and information broken into digestible chunks. Don't forget those (now ubiquitous) social media "share" buttons — make it easy for readers to do the outreach work for you.

Be sure to test your site! Can your Mom go there and figure out how to sign up? If she can't, I bet that others can't as well.



The top of Pete Buttigieg's site in the middle of 2019. Note the focus on what supporters can do, the stripped-down feel and the English/Spanish toggle button in the upper right

## The Mobile Imperative

In 2023, [websites MUST be accessible from mobile phones](#). In fact, if sites aren't optimized for cell phones, Google will knock them down a notch in mobile search results — not ideal, particularly since your potential voters may be on their phones all day. At times, a site that isn't mobile-friendly these days might as well not exist.

Fortunately, most modern site-building platforms — including widely used tools like Wordpress and politics-specific site-management systems — include mobile-adaptive site templates for you (or your tech team) to choose from. The current trend is toward "responsive" site layouts, which adapt relatively seamlessly to the needs of the device on which they're viewed. In responsive layouts, images will shrink and columns will rearrange themselves based on whether they're showing up on an iPhone screen or a 20" flat-screen computer monitor, at least in theory.

Still, campaigns need to check their sites' mobile performance carefully:

- Are buttons easy to click?

- Can people actually fill out volunteer forms or sign up for email easily from a phone?
- What about making a donation?

Campaigns can't miss an opportunity to convert a visitor into a supporter, regardless of how that potential supporter accesses the internet. Don't let your website be a speedbump.

### Managing Campaign Websites

Websites can be a pain to maintain, particularly if the software that runs your site sucks. Fortunately, campaigns now have access to a slew of reasonable options, including:

- Integrated website/CRM packages (like NationBuilder or NGPVAN's toolset)
- Campaign-optimized website packages that integrate with many different mass-email systems
- Vendor/consultant-specific platforms
- Custom-built or templated sites created using Wordpress, Drupal or another popular Content Management System
- Sites built through Squarespace or a similar online publishing and management system

One thing to remember: you'll be spending a lot of time updating your site, so be sure to test the package you're going to buy. It needs to be easy to use, both to create new pages on your site and to add content to existing pages. Basic test: is it simple enough for your volunteers? What about your spouse?

Another rule: beware someone who claims that you need [a custom Content Management System that they're happy to build from from scratch](#) just for you. That's crazy talk — a CMS is a complicated business, and you absolutely want one that's already had a shakedown cruise. DON'T be the "lucky" soul who gets to find all the bugs in a new system.

Stick with website technology that's known to work, whether that's because the consulting firm you use has dozens of clients already on it or because it's widely adopted in the broader online publishing world.

### Most Campaign Websites Look Alike, and That's Fine

Take a look at the two presidential campaign websites shown below. They differ in detail, of course, but the overall arrangement and engagement options are similar. When you examine most competent campaign websites in 2023, you'll see a similar trend — the branding elements will vary, but the sites typically offer pretty much the same opportunities to visitors. That's a feature, not a bug! Campaign sites are designed to serve the same priorities, so it makes sense that the templates tend to converge. Look to differentiate your campaign with content and [branding](#), not with an edgy design that might hide the "donate" button.

Cruz Solidifies Presence in Iowa with "Believe Again" Speech

EN ESPAÑOL

COURAGEOUS CONSERVATIVES

Reigniting the Promise of America

EMAIL

ZIP

I'M IN

I want to DONATE

I want to VOLUNTEER

I want CRUZ GEAR

MEET MARCO

MEET JEANETTE

ISSUES

VOLUNTEER

STORE

DONATE

NEW VISITOR?

Are You Ready For A New American Century?

Email\*

Zip\*

YES I AM!

f SIGN UP WITH FACEBOOK

Two campaign websites from the last competitive Republican presidential primary in 2016

Tailoring Website Content to Individual Visitors

Campaigns don't always have to show the same content to everyone, though. Like online retailers that "recognize" you and show you products you may want to buy based on your past purchases, some technology packages allow you to highlight different information or features based on who a site visitor is. For instance, if the site tags you (via "cookie" or something similar) as someone who's already on the campaign email list, it might show [a volunteer form in place of an email signup form](#). If you're a known donor, you might see a more-prominent donate button instead. Integrated systems that allow this kind of data-driven customization across channels have been a "Holy Grail" for some online communicators for years. More recently, the technology has [made it into](#) common toolsets. In

practice, though, most of us get by just fine with websites that don't change content based on who's looking at them.

## Microsites

Besides a main "hub" website, campaigns can employ "microsites," smaller websites designed to reach a particular audience or to support a specific program. One tactic: campaigns create [microsites to attack their opponents](#), both to focus the message and to insulate the main campaign from backlash. For some historical examples, see this *Campaigns & Elections* piece on [the role of microsites early in the 2012 presidential race](#).

Campaigns sometimes fall in love with microsites, creating them for every new message point or each niche audience. Too many microsites (and some people would argue, ANY microsites) can dilute your communications and recruiting. Plus, each site you build is another property to maintain! So think carefully if staff (or the candidate) want to stake out more turf online — ALWAYS ask if it's worth the time, energy and/or money.

## Email and Email Fundraising

Once new supporters sign up, they're in the hands of your Constituent Relations Management/mass email system. A typical CRM combines a database and a bulk-messaging program to automate the basics of emailing supporters. They're almost always web-based tools rather than software living on your campaign's own laptops. 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 make it easy for people to:

- Join (or leave) your list
- Sign a petition or take other online actions
- Donate

On the "back end" (campaign-facing side), they allow you to format messages and send them to some or all of your list at once. Note that CRM fees are generally based on features and list size rather than usage, though some systems charge by the volume of messages you send.

Most CRMs can make your life more interesting by letting you segment your list, breaking it into chunks based on factors like your members' geographic location, their demographic characteristics or their past interactions with your campaign. A common example of behavioral segmentation: separating donors from non-donors, or donors by the size of their largest recent gift. This capacity to "slice and dice" data makes CRMs a powerful targeting tool, since they help you send messages to people most likely to respond to them...assuming your communications strategy is accurate. List segmentation also helps with the testing of subject lines and content, as we'll discuss in more detail in the chapter on Data and Analytics.



Colin,

\$15,000 a year isn't enough for most families to get by on. But that's what working full-time at our country's \$7.25 minimum wage will get you.

Somehow – unbelievably – we've let that number stand at the federal level since 2009.

**It's time to do better.**

Hard work should pay off. That basic tenet underpins the entire U.S. economy and fuels the work ethic America is known for.

**But workers earning minimum wage today are getting a raw deal. At \$7.25 an hour**, it's hard to keep food on the table or a roof over your head; let alone afford child care, get your kids through college or put something away for retirement.

**An effort is underway to raise the minimum wage to \$12 an hour. Sign our petition and join the call for better pay!**



**Sample email from a Congressional campaign. I wonder what happens after you sign the petition?  
Hint: someone wants your \$\$\$**

### **Political CRMs**

Where do CRMs come from? Many 2023 campaigns will rely on MailChimp/one of its competitors paired with a political donation system like ActBlue (for Democrats) or WinRed (for Republicans). Campaigns can also turn to general-purpose online organizing tools that include list management/mass email, campaign website, supporter databases and online fundraising. Some, like NationBuilder, are equally open to Republicans and Democrats. Others, like ActionNetwork and NGPVAN, will only be available to candidates on one side.

Many digital politics consulting firms and data/tool providers also offer their own custom online toolsets, usually as part of a larger package of services including a campaign website. Plenty of these vendor-specific packages are excellent, but be sure to take your CRM for a test drive before you buy it. Make sure it seems (at least relatively) easy to use. If possible, talk with someone who's already tried it on another campaign.

CRMs designed for specifically for candidates usually incorporate an online fundraising options, for campaigns not simply linking to ActBlue. They 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. We'll discuss these tasks in more detail in chapters to come.

### **Email is Still King, at Least for Fundraising**

Why email? Despite the hype about Twitter and Facebook in politics, [email is still the most effective tool](#) to raise money, motivate volunteers and keep supporters engaged. For example, roughly two-thirds of the \$500-odd million that Barack Obama raised online in 2008 [came directly from someone clicking on a "donate now" button in an email message](#), and 2012 wasn't much different. Even in 2016, the Trump campaign identified potential donors via Facebook advertising, but they hit them repeatedly with fundraising emails once they'd signed-on to support the campaign. In 2017-18, the [Republican National Committee built on Trump's work](#) to create a significant small-donor email list to power their 2018 midterm campaign. In 2020, grassroots Democrats clicked on fundraising emails with wild abandon, giving some candidates more money than they could spend efficiently — though ultimately with [mixed results](#). This year, every campaign I know is building a list as fast as they can.

Why? Email reaches many people who still haven't joined the social web, but it also turns out to have a much higher response rate in practice than most other channels, sometimes by a factor of ten or more. In part, this is because you can open an email at any time, but you pretty much have to be ON Facebook or Twitter when someone posts an update to see it (unless they pay for the privilege of reaching you). **Email remains the "killer app" of online politics in the U.S. — particularly online fundraising — despite constant predictions of its demise.**

**Note that we're NOT talking about spam!** In general, you should only use mass email to communicate with people who have "opted-in" to your list, for instance by signing up online or at an in-person event. Except for hand-typed outreach notes to bloggers, journalists and activists, email messages should serve as a relationship-management tool, not as an out-of-the-blue recruiting tool (a rule frequently broken by campaigns in the habit of buying or swapping lists, BTW — see the section on list acquisition in the next chapter). Of course, every respectable CRM includes "tell-a-friend" links to help your supporters spread the word for you, but that's different.

Of course, email is part of a healthy online communications breakfast, but it's [best when paired with other options](#). **Don't think of it as Facebook or text messages vs. email, but as Facebook AND email AND Twitter AND text messages AND the other channels your supporters want to use** -- many campaigns (and advocacy organizations) find that their Facebook and Twitter followers [also subscribe to their email lists](#). **In practice, the social channels are places to engage with supporters consistently and over the long term, with individual emails and text messages spurring action at critical moments.**



**Sometimes rivals can work together**

### **Email and Mobile Devices**

Mobile devices have changed the way people consume campaign and advocacy emails just as they have websites. Emails that won't work right on phones risk being ignored, since people can easily click away to something that will. As a result, email providers offer "responsive" email templates, which adapt to different devices and displays. Campaigns should definitely take advantage of them.

Mobile phones put particular burdens on digital fundraisers, since people are much less likely to stop and enter a credit card number when they're reading a message on the move. A common solution, as we'll discuss in the Digital Fundraising chapter, is to encourage people to sign up for "one-click" donation systems that store their billing information for later use. This technology is built into platforms like ActBlue and WinRed.

## 6. Essential Tools and Infrastructure, Part Two: Social Media, Video, Mobile and Monitoring

---

Now let's look at the essential outreach channels beyond mass email and a website.

### Social Media

We'll talk about how to USE social media in depth in chapters to come, but first, does a campaign absolutely need to worry about Facebook, Twitter, TikTok et al? It's hard to imagine too many races in which social media WOULDN'T play a part — with half of the U.S. population on Facebook and most journalists, bloggers and political activists still on Twitter, campaigns would be foolish to ignore the social 'net. [Facebook faced a potential boycott movement in 2018](#) because of the Cambridge Analytica data scandal, but even if 100,000 people had dropped off the service, they'd comprise about one tenth of one percent of Facebook's U.S. base. And while the platform's steadily losing users to newer channels like TikTok, campaigns shouldn't worry about Facebook going out of business any time soon.

Most campaigns will need a Facebook page rather than relying on a candidate's personal profile. Facebook pages are intended for institutions rather than individuals, and they have features designed to help feed information to a fan base or following — particularly if you're willing to pay. Facebook pages and Instagram feeds are also easy to connect, allowing you to place ads on both platforms simultaneously.

Facebook and Instagram [place a premium on visual and video content](#), so be prepared to post plenty of photos, video clips and live-streams to your page. When possible, [staff, volunteers and the candidate should amplify the campaign page's posts from their personal accounts](#).

Most campaigns will also need a dedicated Twitter feed, and it may also make sense for individual staffers to have campaign-affiliated accounts of their own. [Trump definitely changed the political equation around Twitter](#) in 2016, and many news articles now include embedded or quoted tweets. [The platform's travails since Elon Musk took](#) over haven't scared that many users away, at least not yet, and it's likely to remain a central part of the communications infrastructure for a while longer.

A crucial thing to remember about social media is the "social" part. Unlike television ads, these are interactive channels, meaning that campaigns can't simply dominate the conversation. Unfortunately, you have to listen to what other people are saying. You'll benefit from it, too, since [social media monitoring](#) is an excellent way to test which messages are resonating and help you pick up early warning of speedbumps ahead.

**A big social-media consideration since 2020: political ad restrictions.** In that year, Twitter and Spotify banned political and issue ads altogether, while Google restricted data-targeting and Facebook instituted disclaimer and registration requirements. After the 2020 election, the platforms extended their restrictions, officially to try to stop the spread of disinformation but in the process [making it harder for campaigns to respond when attacked](#). Meanwhile, [lies spread like crazy behind](#)



[the scenes](#). Great job, guys! Note that as of April 2023, Twitter was again allowing political and issue ads, but that situation could change overnight.

## Online Video

Online video is a natural for most campaigns, accustomed as political professionals are to the world of television ads. [Online video isn't television](#), though: the kinds of content that succeed can be quite different, with authenticity and topic often more important than polished visuals. Online video also needs to catch a viewer's attention quickly. People usually watch only the first few seconds of a video ad or a clip on Instagram, so try to front-load the important points. Do your best to start with a bang and design for people with the sound turned off!

## YouTube

While campaigns often embed YouTube-hosted clips on their own websites and social networking pages, YouTube is a useful outreach channel on its own. Many people now bypass Google to go directly to YouTube to look for information, making it at times the second-most-popular search engine in the U.S. Plus, it's one of the rare "legacy" social sites still retaining a younger audience.

To maximize the chances of people finding their YouTube videos, campaigns should:

- Carefully title, annotate and tag each YouTube clip when they upload it
- Include a link back to their website in the clip description
- When possible, "watermark" clips with the site's URL so that it's visible as the piece plays
- Include captions for people watching without sound

## Video's Emotional Punch

Regardless of where it's posted, online video can reach our emotions in ways few other channels can match, creating a connection that can be quite powerful. For instance, [video of a rally, protest or event](#) — particularly if it includes one-on-one discussions with supporters, volunteers, staff or the candidate — can help people who weren't able to attend feel as though they did.

Similarly, video can help spur action, as when the clip features a direct fundraising appeal from the candidate or from an average donor explaining why he or she decided to give. Think about the power of movies to touch us — they have emotional heft.

For that reason, digital video has DEFINITELY made a difference in the fight for civil justice in the United States. Live video of Black people being abused by police (plus video from officers' own dashcams and bodycams) helped mobilize the Black Lives Matter movement, [amplified by activists on Twitter](#). Video of people being beaten or [killed](#) broke through in a way that dry text never had, and I suspect video will propel other societal wrongs into the public consciousness in the years to come.

Not just in the U.S., either: in 2020, we saw video from social protests from places like Hong Kong make waves around the world. Likewise, thousands of activists filled the streets of Washington, DC

and cities far beyond the United States in protests sparked by video of the death of George Floyd at the hands of police — and [organized digitally](#).

### **Video Goes Mobile**

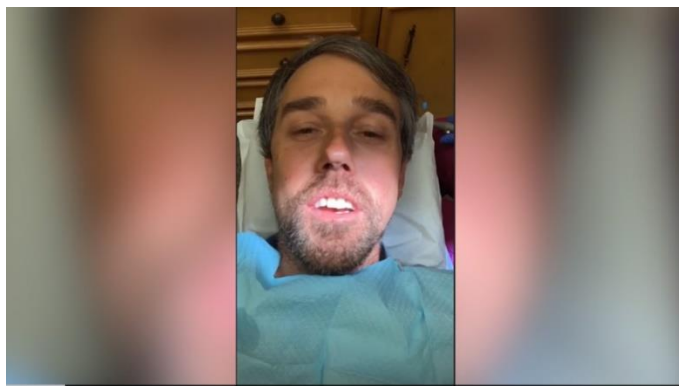
Mobile phones have changed the way people consume video, of course. The evolution toward an all-mobile world means that campaigns [must pay attention to how their video clips work on phones' small screens](#). Is the imagery clear? Does the message come across without sound? Ads that worked fine on TV might not cut it on mobile — more work for your media consultants, yum.

### **Facebook and Video**

Facebook seems to be trying to take over from YouTube as a video-distribution channel online, with the practical consequence that a video posted directly to Facebook will reach many more people than a YouTube clip posted as a link. As a result, many campaigns now post their video clips twice: once to YouTube and once to their Facebook Pages. It's an annoying extra step, but it pays off in extra exposure and engagement. Note that Facebook videos play without sound by default! You can use Facebook's automatic captioning tool to show people what you're saying, but watch out — if you don't edit the results by hand, they can get a little weird.

### **Video Live-streaming: Facebook Live, Instagram and Twitter**

Social media live-video-streaming via Twitter, Facebook Live and Instagram first drew a lot of attention in the political scene in the 2016 election cycle. Since then, live-streaming via these platforms has become routine: candidates regularly use Facebook Live and Instagram live-streams at rallies and speeches, bringing supporters and journalists to the event virtually. Activists are in on the game, too — in 2017 and 2018, members of the Trump Resistance [live-streamed marches and protests](#), amplifying their reach to millions who couldn't attend in person. Don't forget [live-streaming's role in the "Nevertheless, she persisted" episode](#) between Elizabeth Warren and Mitch McConnell! Beto O'Rourke's 2018 Senate campaign provided [a master class for political live-streamers](#), though sometimes [perhaps he went a bit too far](#). Of course, as the 2021 U.S. Capitol rioters are still finding as I write these words, you may not want to broadcast your anti-democratic crime spree to the FBI.



**[Beto O'Rourke livestreams a visit to his dentist in January 2019](#)**

But we've had both online video and live-streaming for years now (have you ever used Zoom?), and it's not clear that easy mobile streaming has added a radically new element for political campaigns. After all, the "[Macaca](#)" and "[47%](#)" moments had a serious effect on two campaigns, and they weren't live-streamed at all. But watch this space — it's possible that live-streaming will turn out to expand the possibilities in ways it's difficult yet to see. For more ideas, see "[Using Periscope and Meerkat for Politics and Public Affairs](#)".

Live-streaming may in fact turn out to be [a boon for opposition researchers](#), particularly because candidates may not know that their words are being broadcast to the world at that particular moment. Gaffe-prone (or truth-telling) candidates beware! Yet another step down the road to a world in which only robots can run for office...and here you thought Mitt Romney was an anomaly.

### **Video as a Training Tool**

Larger campaigns and national organizations may use video more prosaically: they'll turn to it to [help train volunteers](#) and deliver talking points to canvassers and phone-bankers. Unsurprisingly, the Obama campaign frequently posted training videos to prepare far-flung supporters to work on its behalf, and many others have followed their lead in the years since.

### **Video Advertising**

Digital video ads provide a powerful way to put your message in front of the right eyeballs. We'll cover them in detail in the Digital Advertising chapter.



Image: ©iStock/Bratovanov

## Mobile Technology

As we've seen, cell phones will [dominate the future of digital politics](#), and we've already touched on how mobile devices affect websites and emails. Later we'll discuss mobile extensively in the context of Twitter, advertising, fundraising and field organizing — mobile plays a big role in grassroots work in the contemporary environment.

### Text Messaging

Most CRMs can collect cell numbers when someone joins your list, but before 2015 relatively few campaigns in the U.S. had put them to use, in part because of constraints built into the U.S. telecom system. Though the amount of information you can fit into a text message is limited, broadcast text messages tend to have a much higher response rate than emails. Many vendors offer campaigns and organizations the ability to [broadcast texts to their supporters](#).

If your campaign does decide to employ a text program, one good way to build your list is at live events, if you've set up the capability for people send you a short text message to sign up at that moment. Note that cell phones have particular high penetration and usage rates in many U.S. communities that aren't as likely to be on the traditional internet, making them potentially an ideal tool for reaching groups like urban Black and Hispanic voters. As usual, pick the tools used by the audiences you're trying to reach!

Since the 2016 election cycle, "peer-to-peer" apps have offered campaigns the ability to get around limits on bulk political texting by distributing the work to individual volunteers. In fact, to get ready for the 2018 midterms, [the Democratic National Committee bought the mobile numbers of every targeted voter it could](#), specifically to enable peer-to-peer texting! All through the 2020 election cycle, campaigns were [texting supporters en masse](#), in part to escape the limits on face-to-face campaigning imposed by the COVID-19 pandemic. Of course, some campaigns went overboard, bombarding voters in battleground states with unsolicited texts. Despite this tragedy-of-the-commons in waiting, P2P texting is here to stay, at least until a regulatory decision takes it off the table. For more details on peer-to-peer, see the chapter on Grassroots and Field.

Like most other digital campaigning tools, though, text messages usually work better if they're part of a larger outreach and communications structure. By delivering relatively in-depth information to your people over time, for example, email and social media can prep your people to act when they get your text begging for volunteer time.

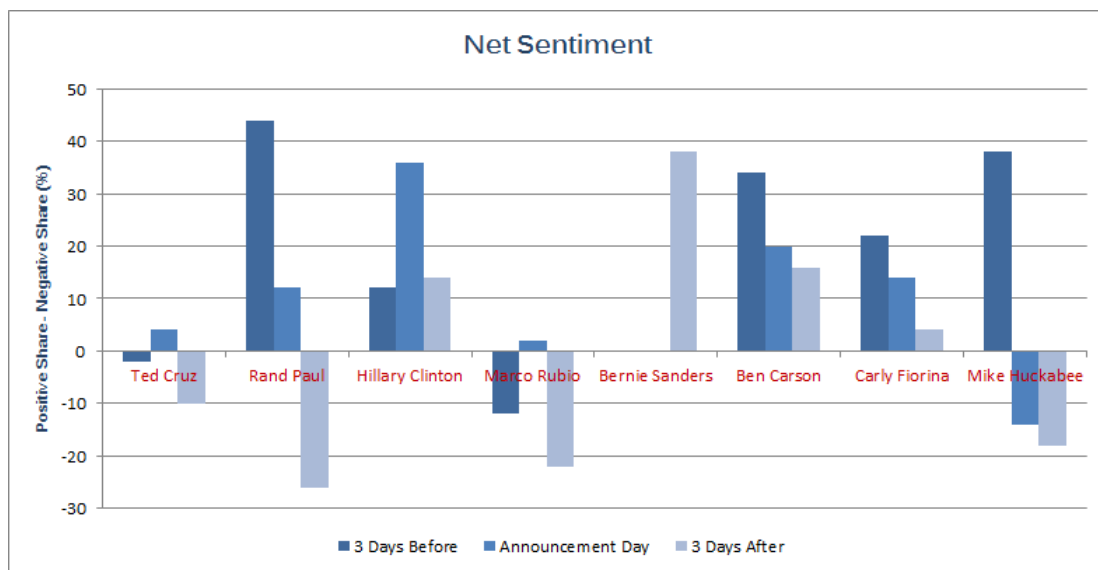
Campaigns typically use P2P texting for volunteer management and Get Out The Vote efforts, but some groups also use texts as a two-way tool by soliciting information from supporters, perhaps through polls and questionnaires. Once recipients reply, a campaign staffer or volunteer can have more in-depth conversations with them.

Mobile means more than cell phones, btw — iPads and other tablet computers are proliferating in the campaign world, particularly to help sign up supporters up at live events. Also, we're seeing more use of mobile fundraising through technology like Square, again often at rallies and meetings.

## Monitoring the Online Conversation

Campaigns will almost always want to set up Google Alert emails to learn when the candidate's name is mentioned online. Pro Tip: set up alerts on your opponent's name, too. Alerts and regular searches are basic intelligence work — if you don't know what's being said, you're fighting blind. They serve as tripwires when new topics come up, but they're just one piece of the [opposition research opportunities the internet offers](#).

Some vendors offer more sophisticated products that can analyze the thousands of online conversations that a high-profile race can generate, but in the past these were generally only available for top-shelf campaigns. By 2016, [social listening](#) was available to campaigns and organizations of all shapes and sizes. At the least, set up Google Alerts and augment them with a regular scan of your opponent's website and social media channels. Check with your vendors, too, to see if they offer more-advanced monitoring as part of a package. While you're there, ask about cybersecurity!



A hint of the kind of data [social media monitoring can provide](#), via GWU's [Peoria Project](#)

## Other Tools

Some campaign somewhere will no doubt try just about any online tool you can think of in this political season, from TikTok to [Pinterest](#) to [QR codes](#). But the ones listed above are most likely to prove essential, and anyone considering a shiny new toy should remember the Big Question: is it worth the time?

## Other Tasks

Wait, what about fundraising? Or advertising? Or field organizing? These are absolutely key programs/projects for political campaigns, but they're more questions of procedures and tactics. We'll cover them and more in the chapters to come.

## Technology Isn't Strategy

As we move forward, always keep in mind that the tools are important, but only fools ignore 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 anyone can send a mass email but that [getting the most out of an email list takes an actual strategy](#). As simple or sophisticated as a given tool is, what matters is how you use it.

# 7. Preparing Your Recruiting, Outreach and List-Building Strategy

---

Time to go fishing for voters! The sheer variety of online recruiting channels can be overwhelming, so let's start with a few basic principles.

## A Quick Rule of Thumb:

Almost every online campaign will end up with three broad categories of supporters:

- A core group of activists, to be relied upon for volunteer time and energy week to week
- A larger group of passive supporters, to be mobilized at key moments such as Election Day or important votes in Congress or the legislature
- A much larger group of uninvolved voters or citizens. These people may be subject to recruiting outreach or persuasion advertising, or they simply may be ignored, depending on the campaign strategy

Understanding who's likely to start out (and end up) in each group is a major part of planning your outreach.

## Identify Your Target Audiences (I.e., Know Whom You're Trying to Reach)

Before you start communicating with voters or potential supporters, understand who the people you need to contact actually are. Surprise! If you're running in a geographically defined district, you'll want to reach voters IN that district.

But which communities or demographic segments will matter most to your campaign on Election Day? What messages are they likely to respond to? Polling, focus groups, voter data analysis, online ad response and message-testing are likely key to figuring those questions out...though if you don't have at least a basic idea just from looking at the fundamentals of your race, you probably shouldn't be running a political campaign. Pro Tip: it helps to listen to voters.

At times, the segments you're targeting may be small-but-vital, for instance including [a narrow slice of the electorate that may be persuadable around a particular issue](#), at least to stay home rather than vote for your opponent. In 2016, the Trump campaign targeted many different groups of voters via Facebook, [whose numbers sometimes measured in the dozens rather than the millions](#).

## Go Where The Audience Is

Once you know your targets, you should of course try to reach them in cost-effective ways. A no-brainer: [go where the right people have already gathered](#), since it's usually much easier to tap into an existing community than to try to create one of your own. Don't ask people to leap into a new online

stream just to follow your campaign — if your potential recruiting or persuasion targets aren't ALREADY using a particular communications channel, you probably shouldn't pour time and resources into it.

## Specialized Online Communities & Petition Sites

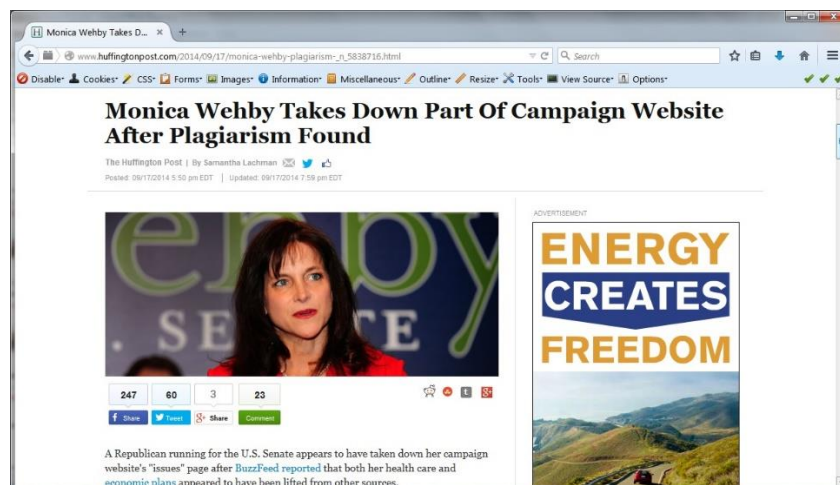
The big audiences are on sites like Facebook, Twitter, Instagram and TikTok, but if you're looking for a concentration of potential supporters, consider niche political communities as well. We'll discuss political blogs in various sections below, but also pay attention to dedicated activist communities. In the U.S., these include [Care2](#), [Democrats.com](#), [Daily Kos](#), and [LeftAction](#) on the Democratic side, and [StandUnited.org](#) on the right. People seeking conservatives can also look to content sites like WorldNetDaily, NewsMax and the Drudge Report.

In some cases, campaigns run ads on these sites. Other times they'll reach potential converts through email newsletters or "sponsored petitions." Regardless of the exact mechanics, the idea is the same: the hunting's better in a target-rich environment.

## Content Supports Outreach

An outreach campaign doesn't have much to stand on without content: [video](#), words and images provide the raw material to attract people's attention and to make your case. Good content (a good story, essentially) helps to break through the constant online clutter — **if you don't have something compelling to say, people aren't likely to listen**. A strategy to produce and distribute good content in the form of photos, [infographics](#), video and stories is essential to online outreach. Don't have time to write enough words? Consider asking an AI for help...though [check the results extremely carefully](#).

Another consideration: as we mentioned in the section on campaign websites, content is bait. Just about any online communications operation can benefit from having a body of clear, topical and targeted information published on the web in a variety of outlets. Your audience? The voters, activists and journalists who'll all be turning to Google, social media and YouTube to learn more about your race or to decide whom to support. When they go looking, you want to have YOUR spin on what they see.



By "content", we mean, "your OWN content", BTW



## Have a Clear Connection Back

As we also mentioned earlier, regardless of how someone encounters your campaign online, make sure it's easy for them to get connected and to stay that way. Every element of the campaign's online presence should have recruiting in mind: don't ever miss a chance to snare a convert.

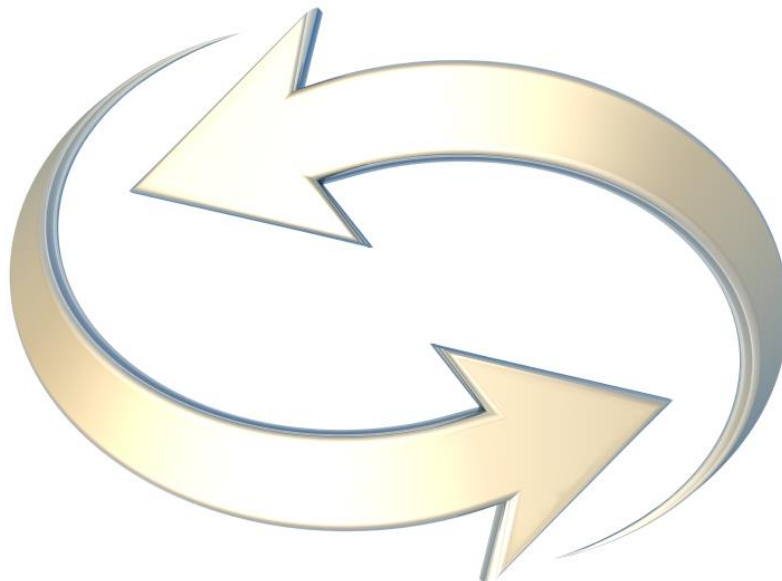
## Integration is Key

As usual, the separate elements of your campaign should reinforce each other. You can [use your email list to promote a new YouTube video or Facebook post](#), for instance — cross-channel communications in action.

Meanwhile, podcasters, TikTokers, bloggers and other online influencers can introduce your campaign to new audiences, whose members might then go to your website, join your list, Like you on Facebook and start recruiting friends. In effect, good campaigns create a "virtuous circle" in which the different parts reinforce each other. By contrast, campaigns whose various pieces exist in isolation will likely waste resources and miss opportunities. We even saw evidence in 2014 that [Facebook ads can increase the performance of a fundraising email](#) — put THAT in the bank.

Online/offline integration is vital too, since much list-building takes place in the real world...as does voting. Pro Tip: don't forget to include the website address, SMS shortcode or QR code on yard signs, car magnets, t-shirts and every other piece of collateral material possible.

Finally, integration applies to concepts and messaging as well. For instance, when possible, individual "landing pages" for online ads should be tied to the theme of the ads. For instance, a Google Ad about a candidate's policy on taxes should link to a page that talks about taxes (and includes a prominent signup form, of course).



**A virtuous circle. Image: ©iStock/jntvisual**

## Not All Your Outreach Will Be Targeted

Sometimes online outreach works best when you point it like a rifle 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 influencers](#), a category that includes national and state-level bloggers, prominent Twitter voices and Instagrammers, Substack writers, Twitch streamers, TikTok creators, individual activists with large personal networks and the administrators of sizable email lists. Basically, anyone with a following! Note that some vendors have sprung up to connect campaigns (electoral or advocacy) with appropriate digital influencers, though we're not sure yet [how well the approach can scale downballot](#).

Sometimes a campaign can identify and target the right individual voices intentionally, but often it's hard to predict which story will catch which person at the right moment to break through. Also, online targeting can [hit a point of diminishing returns](#). If you target your outreach over-precisely, [you may miss a bunch of potential supporters completely](#).

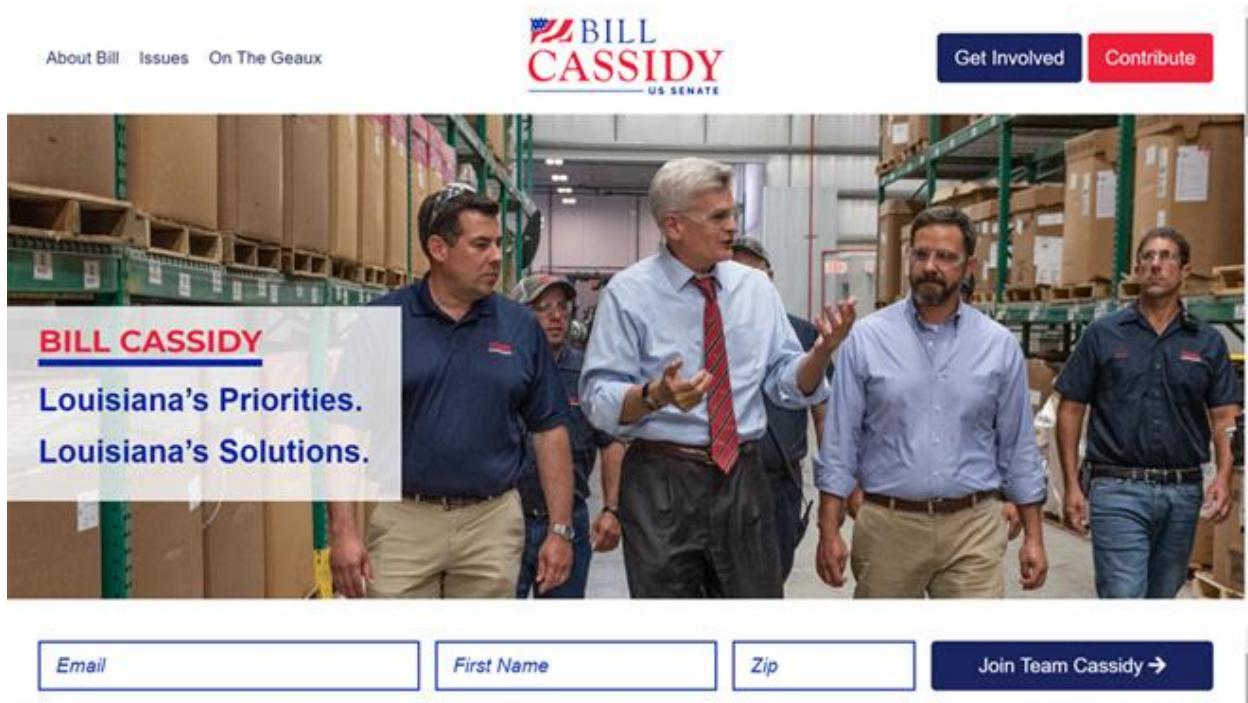
And don't forget that microtargeting requires time, both to create the data models and to prepare individualized content for ads, landing pages and emails. Sometimes the [Return On Investment simply isn't there](#) — remember that the next time [a vendor pitches you on a magical data model](#).

In 2012, Obama's online marketing team sometimes found that [they actually acquired new supporters more cost-effectively through less-targeted means](#) than through hyper-targeted communications. How'd they know? They tracked the long-term Return On Investment of list members brought in through different channels.

The best answer seems to be **a combination of targeted and untargeted outreach**: online communicators can use a sharpshooting approach when appropriate, delivering targeted messages and ads to particular voters at the same time connecting personally with bloggers, Twitter enthusiasts, [Twitch streamers](#) and journalists. Meanwhile, they'll still be blasting information out via mass email, YouTube, Tweets, Facebook updates and blog posts. The targeted approach will often give the best results, but other times a random and potentially overlooked channel can actually turn out to be the most productive.

## If You Build It, Sometimes They Will Come

Some online supporters won't need your outreach: they'll hit your website, Facebook page or Twitter feed entirely on their own. After Sarah Palin's 2008 Republican convention acceptance speech, in which she trashed "community organizers", Barack Obama's website saw a huge influx of cash even before his staff had time to send out an email. His fans didn't care for the Alaska governor's words and were eager to let it be known. Consequently, it behooves a campaign to make it as easy as possible for spontaneous donors and volunteers to act, a reminder to make sure that the website's "donate" and "sign up" buttons are prominent and that the transaction itself doesn't have any hiccups.

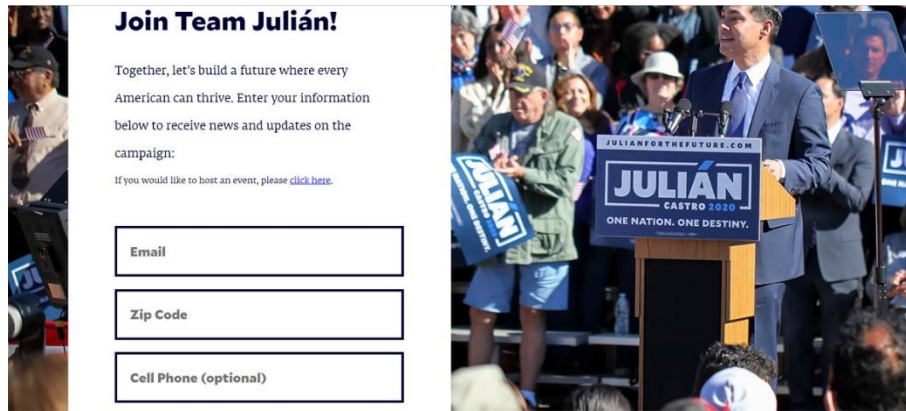


Campaign website for a U.S. Senator in 2020. Note the emphasis on collecting email signups



A similar site for a U.S. House member's reelection campaign. Different state, different party, same recruiting focus

To maximize the chances of capitalizing on such "drive-by" support, as we mentioned earlier, a candidate will want to be visible in as many places online as possible, either via advertising or through campaign-created content. More often, though, politicians won't need an umbrella to ward off an unanticipated rain of support: they'll have to work their tails off for every volunteer and every cent they get.



Julian Castro's 2020 mobile-friendly email signup page, here seen on a laptop

## Communicating Behind the Scenes

We've mainly talked about online outreach that takes place in public venues, but politicians and staff can also reach out behind the scenes to connect with influential voices. Besides outreach to individual journalists and activists, you can also try to join in on mass conversations going on behind the curtain on listservs and discussion groups, though it's likely to take some creativity to find and interact with them.

Another possible strategy: guest-posting on a niche publication, for instance in email newsletter of a union or trade association in your state or district. What about an online chat with its members? Or a Reddit AMA? (Hmmm, [maybe not the latter](#)). 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.

Don't forget nonpolitical forums! Some charities and political campaigns have had great success [recruiting popular live-streamers](#) on Twitch, for example. The trick as always is to find the right voices for the people you're trying to reach and to mobilize.

## Other List-Building Tactics

Campaigns and organizations often turn to a handful of other reliable strategies when they need to build a list fast:

### List Acquisition

Yes, you can buy email lists, and campaigns and PACs often do. The problem is that many of these lists have been shopped around before. As a result, they're frequently out of date (lots of dead addresses). Plus, since many other campaigns have been using them, recipients may be marking unsolicited messages from campaigns as spam. [Both conditions can hurt your email deliverability](#), meaning that your messages to them and to OTHER people — including those who've joined your campaign of their own volition — may end up in spam filters. I won't tell you to rule out the idea of buying a list (though I want to), but approach it with eyes open.



**Weigh the costs and benefits of any tool or tactic you're considering. Image: ©iStock/Oktay Ortakcioglu**

BTW, here's one way to put a purchased list to work: instead of using it to spam people, you could upload it to Facebook as a "custom audience". Facebook would match your list to users' email addresses it has on file and then allow you to target ads specifically at those people. We'll talk about custom audiences more in the Facebook chapter ahead.

### **List Swaps**

In a list swap, two organizations or campaigns with similar audiences work together to grow their lists. They rarely share actual supporter databases, but more often undertake a joint online action and share the new names. Or, each group can message its own list on behalf of the other. For more details and best practices, [see this guide](#). Note that many organizations have found list swaps to be [quite cost-effective](#).

### **Social Media**

We'll discuss the mechanics of social media outreach soon, but what about its ability to build a list? [Converting people directly from your Facebook page or from a Tweet](#) turns out to be a pain at times — frequently, more people will Like, Share and Comment on a petition you post than actually click the link. Organizations and campaigns DO manage to pull it off, though. So if you have an issue that might catch fire on social, be sure to give people an option (a petition or an online action) that gets them on your email list. If it takes off, run with it as fast and far as you can.

Since 2018, campaigns and consultants have used a newer Facebook ad product to fill their email lists: [dedicated "lead generation" ads](#). These often have a favorable cost-per-acquisition compared with other channels. Democratic presidential candidates poured so much money into Facebook lead gen ads in the second half of 2019 that [prices went through the roof](#), however — an example of how too much money chasing too few donors can make Facebook a lot of cash. Note that lead-generation ads aren't ALWAYS the best Facebook list-building option; I've worked with organizations that saw better results when they ran ads that pointed to an action on their own websites. Your Mileage Will Vary, so consider testing both options.

The 2020 campaigns provided plenty of examples of good practices around digital-ad-driven list-building. [Check out this Epolitics.com article for examples and inspiration.](#)

Note that interacting with your Facebook post opens someone up to "engagement retargeting", as we'll discuss in the Facebook chapter. This ability played into the Trump's hands when his team dangled content in front of voters on a vast scale in 2016. His campaign was the first in the U.S. to truly tap into social media for list-building in a big way: their automated and highly targeted Facebook outreach recruited supporters in the millions, many of whom became donors.

## Petitions and Online Advocacy

As we've touched on before, [advocacy can be a path to list growth](#). Most organization-sponsored petitions and "Tell Congress" actions don't spread beyond our core supporters, but if you manage to catch a wave of public interest, [you might pick up tens of thousands of new supporters in a few hours](#). Much of the magic is beyond our control, but savvy organizations look for opportunities to give people something to do when they're all fired up. Campaigns, too: is there [an issue your candidate cares about](#) that's a good fit for an online petition? Give it a try and see if it will help you grow your supporter/donor base.

Democratic Party  
Sponsored · 🌐

Mass shootings have affected our communities too many times. It's time to do something about it.

**SUPPORTS BACKGROUND CHECKS:**

DEMOCRATS	REPUBLICANS
<input checked="" type="checkbox"/>	<input type="checkbox"/>

**CHOOSE ACTION**

Take Action on Gun Violence  
Add your name if you think it's time to take action on gun violence.  
DEMOCRATS.ORG

673 Likes · 190 Comments · 38 Shares

👍 Like    💬 Comment    ➦ Share

### A petition posted by the Democratic National Committee

With all that in mind, let's take a deep dive into online advertising and social media, two areas increasingly intertwined.

## 8. Online Advertising

---

Historically, the campaign world has lagged far behind commercial brand marketers when it comes to advertising online, and in America, most Democrats have lagged behind Republicans. Brand managers often dedicate 50% of their budget or more to online advertising, but with rare exceptions like the 2016 Trump campaign, most political campaigns have averaged five or ten percent or less over the past decade. The covid pandemic provided digital campaigning a boost in general, since it denied many campaigns the ability to reach voters in person, but political advertisers have still tended to put much more of their budget into TV ads than digital ones.

This trend has held even as a political campaigns' online advertising options have expanded exponentially. [Campaigns now have access to far more channels and targeting opportunities](#) than a few years ago, and many vendors can now match voter databases with commercial ad networks deliver a video ad to, say, only past Democratic primary voters in a given Congressional district who are female and between the ages of 25 and 40.

Campaigns and advocacy organizations typically target digital ads based on factors like:

- Location (geotargeting)
- Demographics (age, gender, income)
- Party registration
- Past voting history
- A voter's interaction with campaign content, campaign volunteers or the campaign website
- Other data included in the campaign's voter file

For example, in the closing days of a race, a campaign might simultaneously:

- Target favorable demographic groups or a contact list exported from the voter file with GOTV ads to encourage them to go to the polls.
- Target people who consistently turn out to vote with persuasion (or at least name-recognition) messaging designed to encourage them to make the "right" choice on Election Day.

The more sophisticated your (or your vendor's) data model, the more you can [tailor your ads for specific slices of the electorate](#) (microtargeting). Of course, as we've already discussed, the more precise your targeting, the more important it is that [your data model be accurate](#). And, you have to have content designed to speak to that group specifically.

Even in a campaign's earliest days, online advertising can be [remarkably effective](#) at [volunteer/donor recruitment](#), so much so that many online organizers argue that recruiting ads should start running as soon as a candidate announces. Waste no potential support! The strategy often shifts to persuasion later in the game, and as election day approaches, to [driving turnout among friendly voters](#).

As far as price goes, some digital advertising channels function more like television or radio, where you're paying for a particular number of impressions (in the online world, typically measured in CPM, or cost-per-thousand). On other channels, including Google search ads, you usually only pay when someone clicks.

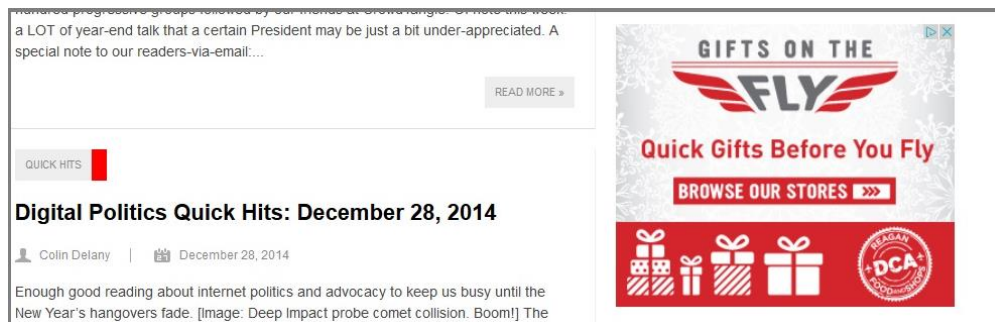
In this chapter, we'll dive more into:

- Precision ad targeting
- Landing pages
- Programmatic display/banner ads
- Programmatic video ads
- Self-serve ad-buying platforms
- Google ads, including search ads
- Blog ads
- Ads on media websites
- Mobile ads and multi-screening

We'll discuss social media advertising separately in chapters to come.

## Precision Targeting

As mentioned above, political ad venders can rely on "cookies," IP addresses, device IDs and other identifiers to reach voters down at the community, precinct or even individual level, hitting them with display (banner) or video ads designed to motivate, recruit or persuade. ["Cookie targeting" hogged the spotlight at first](#), but other tracking options are also available. From a campaign's point of view, the exact technology matters less than whether it works or not.



**Note the "gifts on the fly" ad on this screenshot from Epolitics.com. I was in an airport when I saw this — geotargeting in action**





You can't QUITE target one individual person through cookies or IP addresses ("get me five pre-roll video ads aimed at John Smith and make it fast"), but it's close. You may define demographic characteristics and have the ad network serve your content to the targets in bulk, but campaigns in the U.S. [can and do](#) upload lists of voter IDs from the voter file and have them matched to the commercial ad networks' tracking and serving systems.

These approaches have caught on because of their accuracy down to the personal level, frequently at a 60-80% match rate (usually much better than a Facebook Custom Audience match, btw). You'll often pay more for targeted ads than for a shotgun-blast approach, but [they can be a real resource-saver](#) for campaigns running in districts that are geographically complex (i.e., gerrymandered) or otherwise hard to reach cost-effectively through TV advertising. Plus, why waste a TV ad on a voter who'll never vote for you anyway? **Better to focus your GOTV advertising on people likely to side with you but who might need that extra nudge to get to the polls.**


## Landing Pages

This chapter focuses on the advertising channels themselves, but unless an ad is purely designed to persuade, it's really only the beginning of a process: the landing page seals the deal. Most digital ads will link to SOMETHING, and we usually design that something to encourage the small percentage of people who click to take an action.

Suggested Post

**Hillary Clinton**  
Sponsored · Like Page

Tell Hillary you have her back before the first Democratic debate.




**Join the official Clinton campaign**

[Sign me up](#)

Say you're with Hillary

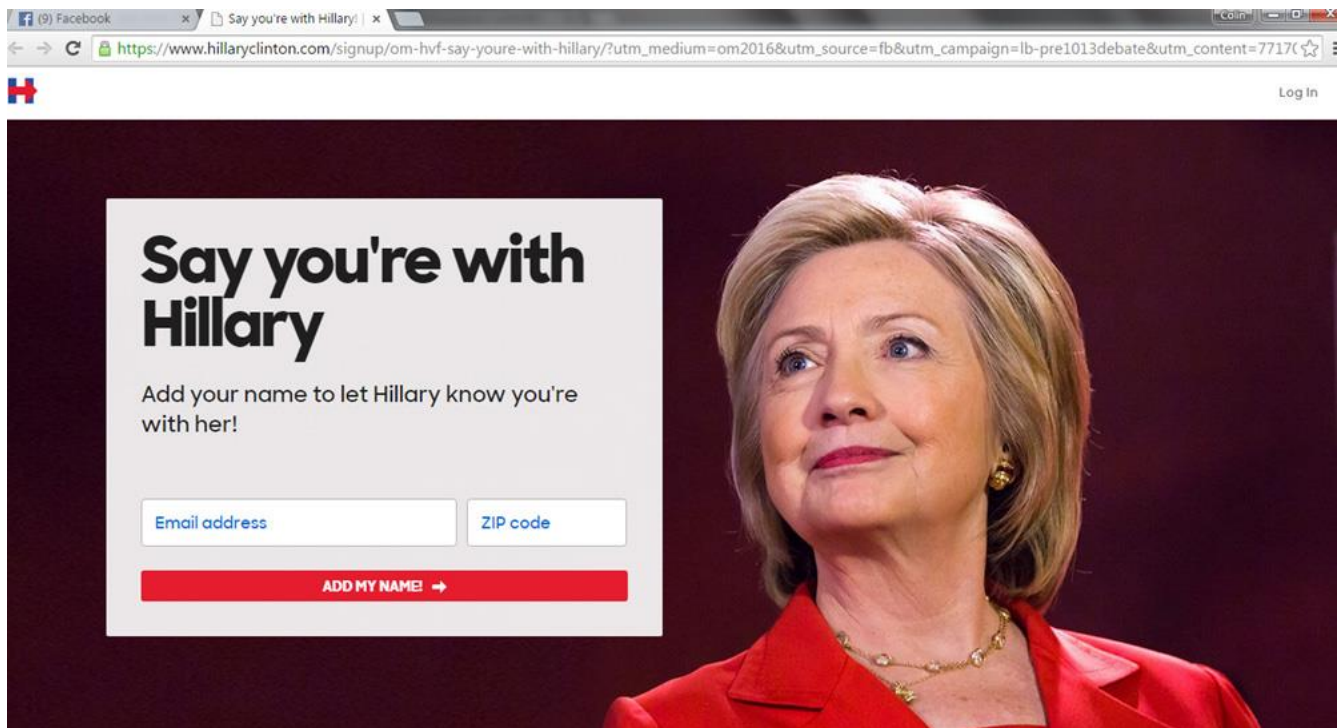
Join the official campaign.

[HILLARYCLINTON.COM/GO](https://HILLARYCLINTON.COM/GO) [Sign Up](#)

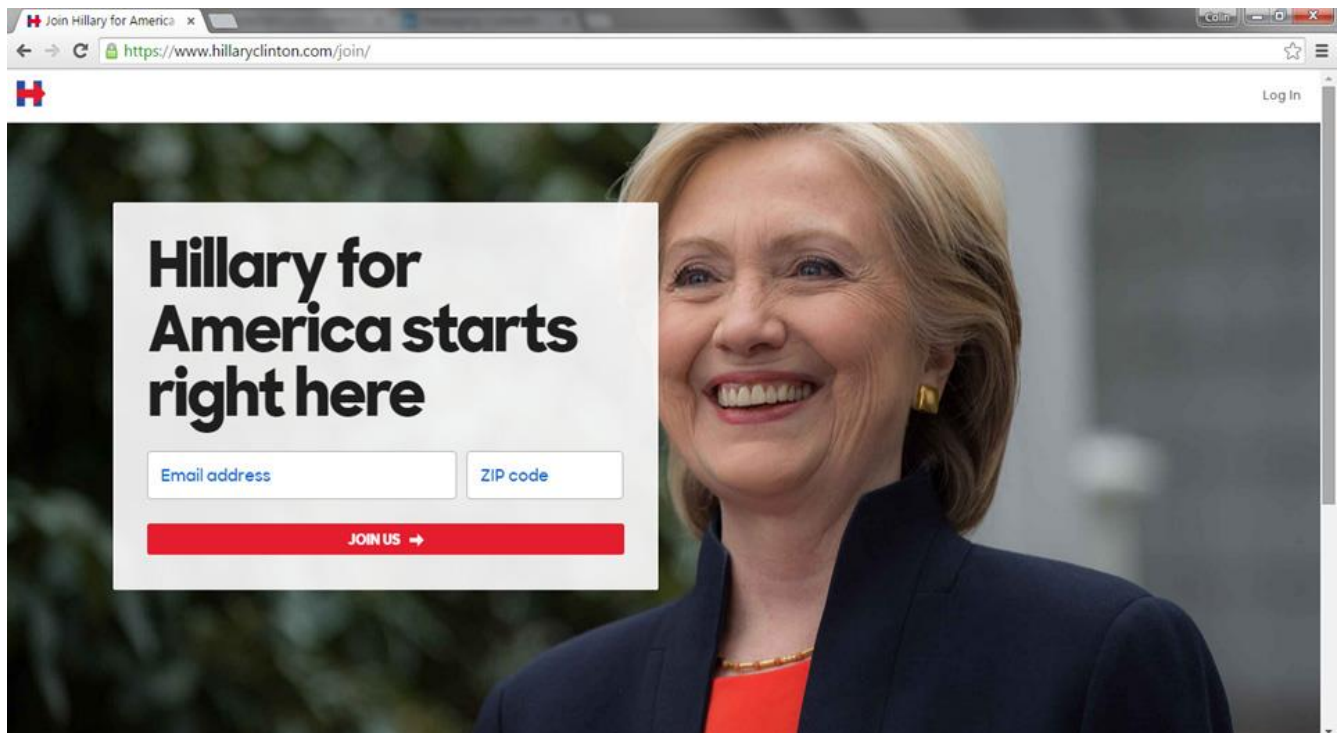
455 Likes 58 Comments 20 Shares 

[Like](#) [Comment](#) [Share](#)

**Hillary Clinton list-building Facebook ad from 2016**



The page the Clinton ad linked to. Note that it uses the same photo as the ad



The campaign's default signup page at the time, which has a different photo and a different color balance than the ad-specific landing page. Campaigns may have many different landing pages tied to various ads or other outreach initiatives

Landing pages usually work best when they echo the themes and visual style of the ads that link to them. Hard experience has shown that extraneous links and too much text tend to hurt performance, so keep your landing pages focused. For campaigns willing to invest in them, tools like Optimizely can rearrange page elements on the fly to find the version that yields the most completions. [List-building and fundraising are usually trench warfare, not blitzkrieg](#), and a percentage here or there can add up to significant money.

Let's look at the main display advertising channels available in the U.S. as of 2023.

## Display & Video Ads

Display ads are everywhere online. They derive from the simple banners that appeared in the early days of the web, but the family now includes sophisticated video pieces, animations, "floating" pop-overs and more. Display ads remain popular for recruiting, persuasion and candidate name-recognition, but they sometimes present a hurdle: they may have to be tailored to the particular requirements of a given website or publisher, particularly if they include higher-end features.

**A big development over the past few years: the reselling of display inventory in standardized ad units.** Nowadays, unless you're buying on a blog or a particular media site, you usually go through a vendor to purchase potential ad space on many different sites at once. In this kind of "programmatic" ad buying, your vendor helps you to target particular voters or demographic segments regardless of the sites they're visiting at that moment — just about wherever they go online, they'll see your ads. Behind the scenes, you're bidding for the right to put your ad in front of a particular web user on a particular website, a process that takes place in milliseconds! Even down-ballot campaigns can access programmatic ads via the self-serve vendors described below.

**Note that targeting restrictions on other channels have made programmatic ads even more attractive.** Google won't allow voter-file targeting, Facebook makes you jump through approval hoops and TikTok and Spotify are off-limits for political ads entirely. Meanwhile, programmatic vendors are quite happy to make your ad-targeting and ad-purchasing experience as smooth as possible.



A typical political display ad, this one designed to run in a vertical sidebar. These can be highly targeted; this one followed me around online after I went to O'Malley's site (an example of "retargeting" a website visitor)

## Video Ads

As voters move away from broadcast and cable TV, video ads have started to supplement and sometimes replace paid TV spots. Like programmatic banners, programmatic video ads may run on many different content websites, depending on what sites the targeted voter is looking at. Video ads may display on a web page like a banner ad, but they usually run as a "pre-roll" ad that viewers see before videos hosted on sites across the web. As many Americans "cut the cord" and abandon cable, video ads are becoming one of few ways campaigns can get their messages in front of the right eyes reliably.

Another advantage of video ads: they're close enough to traditional television advertising that media consultants feel like they can adapt their content quickly! Not always a good idea, though, since you should design video ads for the medium. Fifteen- and thirty-second videos are the norm (though some campaigns have tried six-second versions), and they work best when they make their key point in the first couple of seconds — the slow build may work on television, but it's deadly in an environment where someone can click away. Check with your ad vendor to discuss your options, and as we talked about in the chapter on infrastructure, don't forget that your videos need to work on mobile. **Pro Tip: keep your candidate's name on screen at all times, since viewers may only look at your ad for a moment or two. It helps if the audio track repeats the candidate's name several times as well.**



**A programmatic video ad featuring actor Ernie Hudson (the fourth Ghostbuster!) that I ran for [The Hometown Project](#) in 2020. Hudson was supporting a local candidate from the area he grew up in, [The Hometown Project's](#) specialty. Note that the candidate's name remained on the screen throughout the ad**

Campaigns typically buy pre-roll and other video ads through the same vendors that handle their display ads, though a video ad typically costs around twice as much as an equivalent display ad buy. Targeting options for video ads also mirror those available for display ads — demographic, geographic, voter-file targeting, etc. You can also run video ads on Facebook, but we'll cover that in the upcoming Facebook chapter.

## OTT/Streaming Video Ads

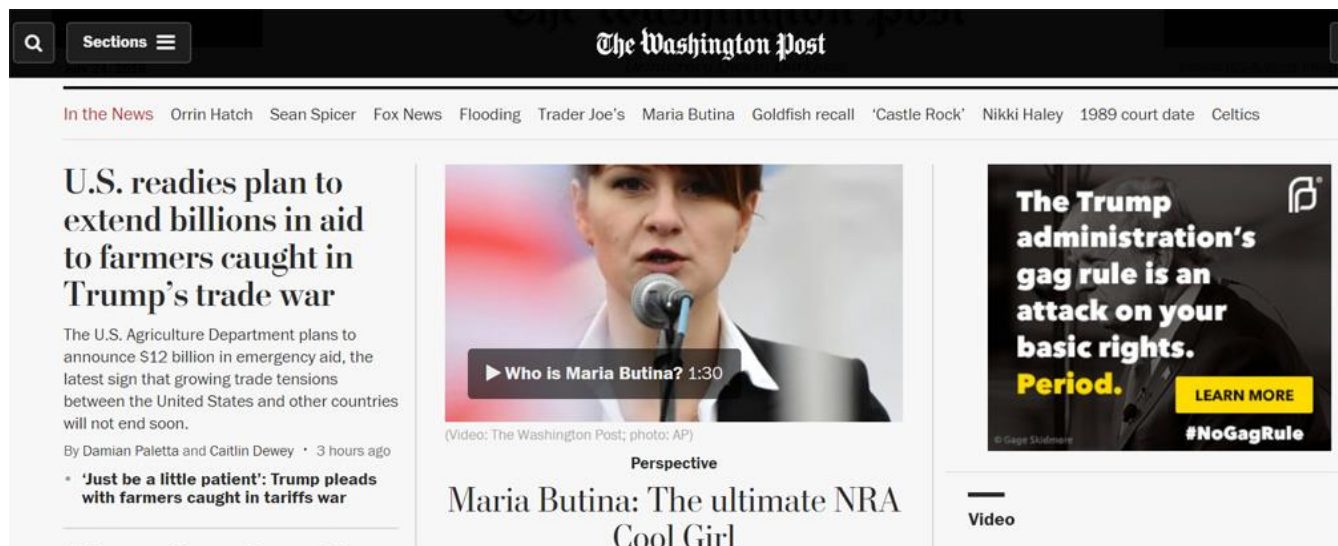
In addition to programmatic video ads, note that campaigns can also purchase targeted cable or "OTT" ads that run on streaming services. Basically, if the ad is on a streaming service, it's OTT. If it's served via a cable box or satellite dish, it's cable. If it runs on a website or mobile app, it's probably programmatic. Like programmatic ads, OTT/streaming ads can be targeted via voter file or other custom target audience.

Campaigns and outside groups put a ton of money into streaming ads in the 2022 midterms — not a surprising development, considering how much time Americans now spend staring at Hulu, etc. OTT ads do have to be formatted to different specifications than programmatic ads, and as of this writing, they also tend to cost two or three times as much as programmatic video. But since they usually run on much larger screens and break into shows as they run, streaming ads also SHOULD be more effective. In practice, advertisers usually include streaming ads alongside programmatic ads or regular TV ads in a multi-screen strategy, hoping to catch voters wherever they happen to be looking.

## Self-Serve Online Ad Buying

Several political ad vendors now offer platforms through which campaigns can buy their own targeted display or video ads in bulk. With minimum buys in the hundreds of dollars rather than tens of thousands, these self-serve ad portals let small campaigns reach voters with the same targeting tools as the big boys, without a degree in computer science.

The result? [A flurry of online advertising in state and local races](#), particularly state legislative races, and we should expect to see much more of it at the state and local level in 2023 and beyond. Note that with most platforms, you'll need to be ready with ad variants in different sizes and configurations to match the needs of the ad networks that will be displaying your content. Often, you can pay an extra fee and use the self-serve platform's pre-packaged templates. Note that some platforms are partisan, while others work with anyone. My own work with the Hometown Project in 2020, 2021 and 2022 relied heavily on DSPolitical's Deploy platform, which is designed specifically for campaign consultants. Down-ballot Democrats can use the same firm's [DemocraticAds.com](#) service whether they have a dedicated digital consultant or not. It's open to the (Democratic) masses.

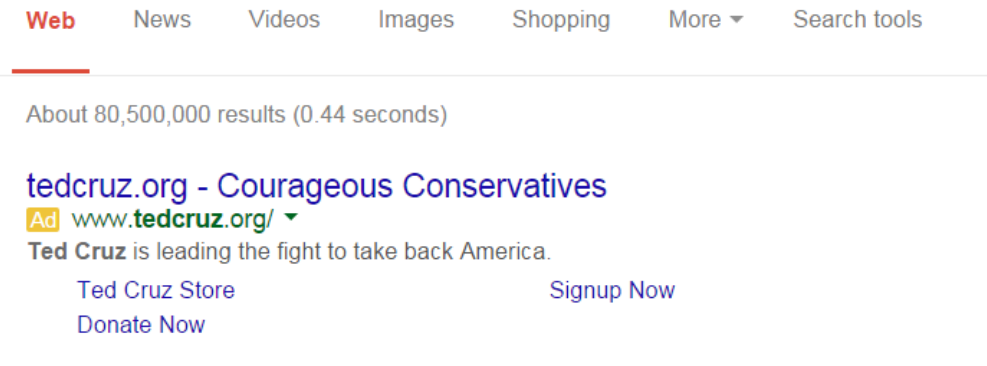


The screenshot shows the Washington Post website interface. At the top, there is a search bar and a 'Sections' menu. Below the navigation bar, a horizontal list of news topics is displayed: 'In the News', 'Orrin Hatch', 'Sean Spicer', 'Fox News', 'Flooding', 'Trader Joe's', 'Maria Butina', 'Goldfish recall', 'Castle Rock', 'Nikki Haley', '1989 court date', and 'Celtics'. The main content area features a large article on the left with the headline 'U.S. readies plan to extend billions in aid to farmers caught in Trump's trade war'. Below the headline is a sub-headline: 'The U.S. Agriculture Department plans to announce \$12 billion in emergency aid, the latest sign that growing trade tensions between the United States and other countries will not end soon.' The byline reads 'By Damian Paletta and Caitlin Dewey · 3 hours ago'. A small bullet point below the byline says: '• 'Just be a little patient': Trump pleads with farmers caught in tariffs war'. To the right of the article is a video player with a thumbnail image of Maria Butina speaking at a microphone. The video title is 'Who is Maria Butina? 1:30'. Below the video player is the text '(Video: The Washington Post; photo: AP)' and the word 'Perspective'. Below that is the main headline for the video: 'Maria Butina: The ultimate NRA Cool Girl'. To the right of the video player is a large black banner with white and yellow text. The banner text reads: 'The Trump administration's gag rule is an attack on your basic rights. Period.' Below this text is a yellow button that says 'LEARN MORE' and a hashtag '#NoGagRule'. In the bottom right corner of the banner area, there is a small icon of a person and the word 'Video'.

**A Planned Parenthood banner on WashingtonPost.com — note the inclusion of a hashtag**

## Search Ads (Google Ads)

Most of us are used to seeing ads on Google results pages based on our search queries. Additionally, Google sells "content ads" on thousands of sites across the web (including [Epolitics.com](http://Epolitics.com)), also targeted by keyword but based on the content of individual web pages. Still, if you say "Google Ads", people expect you to be talking about search.



### Ted Cruz ad at the top of Google search results. The search query? "Ted Cruz" — a good practice for others to follow

Search ads have proven effective for both commercial and political advertisers, in part because they allow easy testing of ad message/keyword combinations. In practice, [Google Ads have turned out to have an excellent Return On Investment](#) for some campaigns when used to build fundraising lists. **Pro Tip: most campaigns should run Google ads on their candidate's name AND on names of their chief opponents.** Don't miss a chance to put your message in front of someone searching for the other guy. [Side note: once when I needed to Google a vendor's address on my phone, an ad for one of their biggest competitors topped the list.]

To get the most out of search ads, test different ad variants and track the results. Since ads on a particular keyword are arranged and emphasized based on the amount each advertiser has "bid" to purchase those keywords, you may be able to reach more people for the same amount of money by advertising on more-specific queries. Smart advertisers will test many different keyword/ad combinations to find the best and most cost-effective results (see the chapter on Data and Analytics for more).

*As noted earlier, of course, Google has restricted political targeting on its platforms. [Lying is still okay](#), though, so at least we've got that going for us.*



### A similar search ad for Amy Klobuchar's campaign in 2019

Two other considerations about Google ads: first, if you target well, they'll reach people at the moment they're potentially interested in your issues, since they're either searching for it or they're on a page that's somehow related. Second, search ads have a secondary branding effect, since they put your message in front of web searchers and readers regardless of whether they actually click on them. Some research has even shown that it's beneficial to have a Google Ad show up on a page that also has your site in the organic Google search results — if a page contains both your ad and your link in the Google search results, more people click on your link, as if the ad delivered extra visibility or credibility.



## Media Websites

Local TV or newspaper websites may be a good angle for some electoral and advocacy campaigns. These sites are typically read by the local political class, and prominent ads on them can have a disproportionate effect on political conversation in that community. Ads on local media sites are often relatively cheap, and you may be able to buy out the entire front page (a ["homepage takeover"](#)) or the political section cost-effectively. Takeovers are particularly useful to draw attention to milestones like campaign launches or the start of early voting. [Pro Tip: buy early and freeze your opponents out.](#)

Depending on the publisher, display ads may be targetable at site users who fit a specific demographic profile, particularly on sites like web portals, newspapers and others that collect financial, demographic and usage data on their readers. An advertiser on Capitol Hill-focused sites, for instance, can often deliver ads to employees of individual companies or government agencies (Congress, anyone?), showing them only to readers coming from the selected .com, .org, or .gov domain(s). Advertisers can also audience-target by buying ads directly from special-interest sites (like political news sites) or on political sections of media websites.



## Blog Ads

Campaigns can buy advertising on blogs, these days often directly from the blog owner. Blog ads are naturally targeted based on each blog's audience niche, and ads on local or regional political blogs frequently reach influential audiences at a low relative cost. You'll likely need to contact the blog owner directly to discuss, since the various blog-specific ad networks that used to exist are now mostly defunct. See the chapter on list-building strategy and the chapter on social media strategy for more for more about leveraging blogs and other online communities for political ends.

## Mobile Advertising, Geofencing and Multi-Screening

Campaigns were already running mobile ads on Google and content websites way back in 2010, when former Congressman Michelle Bachmann reportedly bought ads aimed at people at the 2010 Minnesota State Fair. Location features built into mobile phones and some tablets [let us geotarget voters and decisionmakers](#) with [some precision](#). For advocates, this often means restricting ads to the zip codes around Capitol Hill, statehouses and corporate headquarters, while candidates often advertise on Election Day to reach people [finding their polling places](#) or [looking up candidates while standing in line to vote](#).

Advertisers now often match voters' mobile phones and their desktop/laptop computers, letting us target the same voters with mobile and desktop ads at the same time. Mix some targeted TV, OTT and pre-roll video into the cornbread batter and you'll start to catch up with voters' multi-screen reality. Ask your advertising vendor for options.

Here's another way reach a mobile audience, BTW: Facebook ads. As we'll soon discuss, boosted Facebook posts may be the only mobile ad strategy some campaigns need.

## Internet Radio

Campaigns have long found terrestrial radio to be a cost-effective way to reach voters, particularly because audiences of individual stations tend to split along ethnic, linguistic or other politically important lines. Internet radio is the natural successor, and many campaigns now turn to [Pandora](#) and other audio-streaming services to reach voters (as of this writing, Spotify is still off-limits). As with traditional radio, listeners tend to cluster in niches (Spanish-language programming, for instance), and streaming services can geotarget as well. Plus, most gather at least basic demographic information on their listeners when they sign up.

One limitation on internet radio? It's often hard to reach a given voter enough times to break through. If a vendor only lets you reach a listener a couple of times a week, you're not too likely to persuade them of much of anything with audio ads alone. Perhaps it's best as one component of a multi-channel approach?

## **Advertising and Message-Testing**

Pollsters beware: Facebook and Google ads give campaigns the ability to test messaging without focus groups or phone-banks — while recruiting supporters at the same time. For instance, a campaign might test several different Google or Facebook ads — each with different text and headline or a different image — around a single set of interests or demographic parameters. In each case, the rates at which the different messages are clicked will quickly show which ones resonate and which don't. Pro Tip: If no one clicks on a certain headline, that's a good sign that it's not working. Look for more on A/B testing in the chapter on Data and Analytics.

## **Social Media Advertising**

What about advertising on Facebook and Twitter? We'll cover the options in detail when we address each tool in its own Very Special Chapter.

## **Budgeting for Online Advertising**

Good question! Let's cover that in the chapter on Logistics and Budget. Next up: social media strategy in depth.

## 9. Social Media Marketing

---

If you want to go where the people are, social media's a powerful place to start — more than half of Americans use Facebook, at least for now, and many check it before they have their morning coffee. Meanwhile, TikTok is booming, particularly among the young. [Political conversations are taking place in social media spaces all around us](#) whether we know it or not, and if you want to monitor and shape the discussion around your own campaign, you'll need to be present where it's happening.

### Social Media is Social

Unfortunately, you can't just hop on Facebook and Twitter and expect people to come a-running. One common mistake: to treat social media as yet another set of broadcast channels. Of course, you CAN just post your content and sit back to watch the results, but you're likely to see a more robust response if you actually interact with people when you are able.

But going back and forth with people takes time! Which is one reason that campaigns tend to focus on the big venues like Facebook and Twitter and ignore the plethora of smaller networks unless they meet a particular need (for instance, connecting with an ethnic- or interest-based community). Campaigns will play in spaces like [Instagram](#) and even [Pinterest](#), but they'll often be posting content there that they were already planning to put on Facebook or Twitter (recycling is a virtue).

As in every other area we talk about in this book, each tool has an opportunity cost: spread yourself too thin by building profiles on too many social sites and you won't use ANY of them well. So in this book, we'll focus on the big players, Facebook and Twitter, though we'll also take a quick drive by platforms like TikTok, LinkedIn, Instagram, Twitch, Reddit, Twitch and SnapChat.

### Rule of Thumb: Let Other People Do the Work for You

One implication of the "social" nature of social media is that information spreads person-to-person. When you encourage your supporters to act on your campaign or cause's behalf, they become virtual ambassadors for you. So, give them the tools in the form of good content to spread, and be sure to let them know about it. Sometimes your email list is the most powerful social tool you have, since you can [use email to encourage your list to share your content with friends and family](#).

Some campaigns and organizations go a step farther and [create "social media response teams"](#) or "social media ambassadors" by reaching out directly to supporters who are either influential or highly active. Dedicated supporters are often happy to be singled out as Important People, and a daily or weekly email or text message can keep them working on your behalf. Hillary Clinton's campaign [built just such a Twitter posse late in 2015](#) and used it to amplify messages during key moments like presidential debates. In the 2020 cycle, [candidates like Amy Klobuchar did the same](#). Nonprofit groups have also adopted the idea, frequently as [part of a larger "super-advocate" program](#).

In 2020, the Biden campaign [actively connected with Facebook pages and individual content creators](#), building partnerships that helped him reach deeper into online communities and friend networks than the campaign could have on its own. Professional staff rarely feel comfortable surrendering

control over content, but Biden's team wisely realized that they could not match Donald Trump's wide reach on social media without help from others. Supporters made TikTok Biden's second-biggest video platform themselves; the campaign didn't have a significant official TikTok presence at all. We're already seeing signs that [Biden's team will repeat this approach in the 2024 campaign](#).

Bernie preceded Biden on the social front, of course, [tapping his supporters' creativity](#) and encouraging [activist self-organizing](#) in his 2016 and 2020 presidential attempts. Will other campaigns copy them?

## Sometimes, Social Media Happens TO You

One consequence of social media being social? You can't control the conversation about your campaign, cause or candidate.

Just ask Mitt Romney about those [binders full of women](#), or Hillary Clinton about the [Hillvetica font](#). But let's pay tribute to the grandmother of them all, [a nice lady with a little crush on Barack Obama](#):



ObamaGirl: A harbinger of [Things To Come](#)

I don't think this video hurt either of their careers! Not everyone's so lucky, though, and your campaign may find itself in the crosshairs of ridicule or worse. Not much you can do about it, though, so grin, bear it, stay on your strategy and see if you can [use a little humor to turn it back](#).

Now, on to the tools themselves.

## Facebook and Twitter

Facebook and Twitter have become so big — and the strategies to use them so complex — that each one deserves its own chapter. Let's look at the lesser channels first, then move on to each of the two Big Kahunas on its own.

## Other Social Networks: Instagram, LinkedIn, TikTok, Pinterest and More

Campaigns may choose to invest time in communities like:

- Instagram (photo- and video-sharing, with a mobile emphasis and a BIG audience, owned by Facebook)
- LinkedIn (professional connections)
- Pinterest (more photo-sharing)
- Reddit (a content-sharing community whose Ask Me Anything/AMA feature saw many politicians, until candidates started stumbling)
- Twitch (videogame live-streaming)
- TikTok (short videos, booming among the young)
- SnapChat (a medium for ephemeral messages)

As we noted above, the 2020 Biden campaign's [partnerships strategy included supporters active in channels like TikTok](#), where they would create and share content promoting him for president. Besides being able to take advantage of these people's individual followings, the campaign benefited from the fact that their videos and memes were created by "natives" — they looked real, not slick. Pro Tip: play well with others and you might reap serious benefits.



**The Spanish-language version of Jeb Bush's 2016 presidential exploratory committee announcement video, posted on Instagram. Note the comments, a common feature of online life. For both supporters and opponents, they're a channel campaigns cannot fully control. Also note that Jeb! might could have done a better job anticipating his potential weaknesses as a candidate.**

In the summer of 2015, Hillary Clinton's campaign [got press for being active on Instagram](#), including for a photo of [an array of pantsuits](#). She wasn't alone, since [Mitt Romney was already into Instagram in 2012](#), and Jeb Bush announced his presidential campaign in a 2015 Instagram video.

Though many or most campaigns of any size will have at least a token Instagram presence, we don't have a ton of evidence that organic Instagram content is going to get votes, build an email list or raise money. For one thing, people can only Like your Instagram posts, not share them, which removes most of the potential for viral connection. And, organic posts can't contain links, so people can't click through to a petition or fundraising page. In practice, most campaigns will end up posting essentially the same videos and photos they prepare for Facebook to Instagram as well, perhaps formatted slightly differently for each platform. To reach people in bulk on Instagram, you'll almost always need to run ads via Facebook.



### **A legend from its first day on Earth: The Pantsuit Post**

You can include an Instagram placement with your Facebook ads when you work through the Facebook ads manager interface, or you can run an Insta-only ad campaign. If you choose both, Facebook's algorithms will serve the ads to a given user depending on which platform the person is using at the time. The distribution between Facebook and Instagram will depend on the details of the audience you've chosen for your ads. If you limit them to people under age 50, for example, you're likely to see more of them delivered to Instagram compared with targeting an older group of users.

**TikTok** is still a niche application from a political campaign point of view, but it has proven to be a powerful tool for individual activists. In the recent movement for social justice in the U.S., activists and bystanders have used the platform to post videos showing both police misconduct and the protests it has sparked.

Candidates have tried to follow. Besides Biden's proxy outreach described above, campaigns such as Jon Ossoff's successful Senate run in Georgia in the 2020 cycle [at least tried to put the platform to work](#) persuading voters. Since TikTok has banned political advertising as of this writing, most campaigns will need to imitate the Biden campaign and connect with TikTok natives to get their content seen widely. Tempering TikTok's political value? The chance that Congress [bans it entirely](#).

**LinkedIn** has interesting potential, particularly for down-ballot candidates who need to tap their own connections to build money and support. Campaigns can use LinkedIn ads to target people based on occupation, which ought to be useful for candidates reaching out to people in particular professions (a doctor connecting with other doctors, for example). Ads can also be targeted by employer, which would help a campaign or advocacy group reach people who work for major local businesses and institutions. Early in her 2016 campaign, Hillary Clinton posted an article touting her small-business policies to LinkedIn's native publishing environment, but other campaigns have not followed her example since.

**Reddit AMAs** once [attracted a burst of political attention](#), but they [haven't always gone well for the politicians involved](#). Buyer beware.

**SnapChat** drew [several Republican presidential candidates](#) early in the 2016 cycle, though it's difficult to tell if they seriously thought it could help with outreach to younger voters. They may just have sought media attention by associating themselves with the next shiny online toy. Either way, we haven't seen evidence yet that investing in SnapChat paid huge dividends for campaigns. Ever.

**Twitch** may not seem like a natural fit for campaigns, but several advocacy groups have [seen great results](#) when they can find a popular Twitch gamer who'll livestream on their behalf. I recently saw a presentation from someone who'd worked with a Asian-Pacific Islander organization to raise a couple of hundred thousand dollars from a 24-hour livestream!

## Social Inspiration

For more ideas about using Instagram, Pinterest and even the dating app Tinder for politics and advocacy, see the 2015 Epolitics.com article, ["Seeing Beyond Facebook & Twitter for Social Media Advocacy"](#).

## Blogs

If social networks are the modern town square, 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. Also, since most bloggers have also joined Twitter, that channel can be a good venue to catch their attention.

Blog outreach may be more of a priority for a local candidate than a national one, since state and regional political blogs provide convenient gathering spots for local political activists, places you can reach them without necessarily having to spend money. Like many other forms of social media outreach, blogger relations is often cheap financially but expensive in time, a good fit for scrappy campaigns with more enthusiasm than cash. Note that the Daily Kos community [played a big role in elevating progressive candidates](#) in recent years, a sign of political blogs' continued relevance.

Start with research, since time spent contacting the wrong sites or the wrong people is wasted. If you don't already know where to begin, try Google — 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 particular issues dear to the candidate's heart, hoping to pick up financial or other support from outside their districts. These days, blogs and mainstream news outlets have merged to some extent, and most major publications encourage (or require) their opinion writers and reporters to write for in-house blogs.

**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.

## Custom Social Networks

In past election cycles, some campaigns gave volunteers additional opportunities 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 [now-defunct Ning platform](#), as did that of [2010 Massachusetts senatorial candidate Scott Brown](#). Both provided outreach and fundraising hubs for activists.

The MyBarackObama custom social network turned out to be a useful tool for Obama volunteers in 2008, particularly 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 (Pro Tip: it's 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. Something else to note: MyBO's 2012 equivalent did NOT include a significant social networking component.

## Other Online Communities

As we discussed earlier, plenty other online communities besides Facebook and Twitter do exist, and many cater to people with particular interests or who belong to particular demographic groups. Depending on your district or your issues, it may make sense to have a presence in one or more of them. One way to find out? Ask the voters! Besides Facebook, where do they go online? If one or two places turn up repeatedly as you're talking with people, take a look.



## 10. Facebook

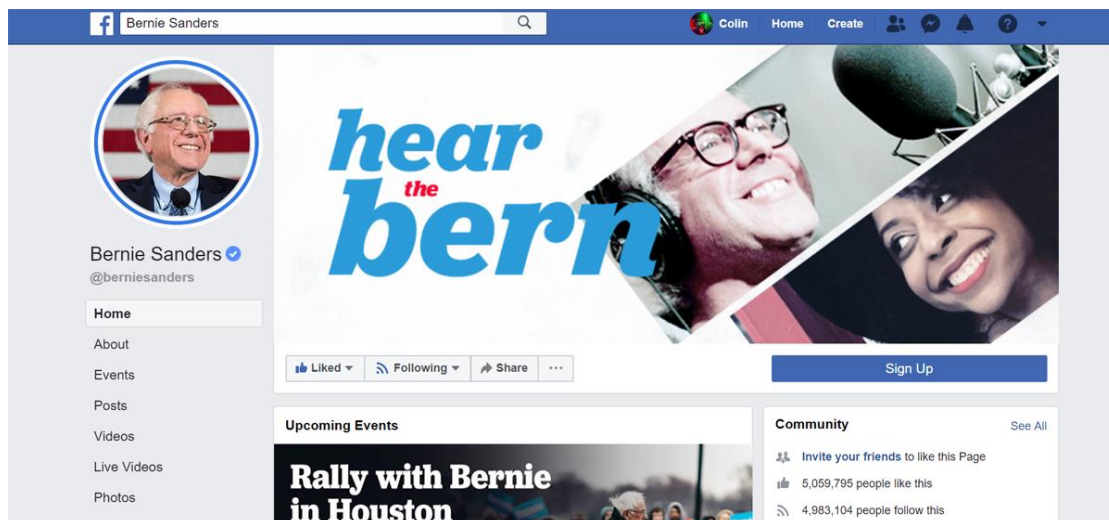
You can't talk digital politics in 2023 without talking Facebook. The platform is simply ubiquitous: its web of relationships reaches into almost every community and country on Earth. In some regions of the world, Facebook IS the internet.

For campaigns of any size and goal, Facebook can provide a direct connection to voters and a forum for supporters to interact with each other and their friends. The data Facebook collects on users lets campaigns reach them with precision and at scale — [as the Trump team ably demonstrated in 2016](#). After that election, Facebook became the news itself, with the [Russian hacking](#) and the [Cambridge Analytica](#) scandals scorching its facade.

The company's response included new disclosure and residency requirements that every Facebook page — and every person placing "political" advertising — still must complete. Campaign ads (and all other ads deemed "political") will be preserved for several years, something useful for monitoring and opposition research at least. The rules were evolving as of 2023, but start at the Authorizations tab on your page or personal profile to see how to get verified. It can take several days, so do not wait until the last minute!

Also note that Facebook won't always allow page owners to link a page and an Instagram account for advertising purposes in the weeks immediately preceding a general election in the U.S. That restriction burned me in 2021, and you don't want to fall victim yourself. Link those properties early, if you plan to advertise on both platforms — or on Instagram at all.

Another hurdle this election cycle? The recent disabling of most political "proxy" targeting options for Facebook and Instagram ads, including targeting by media viewership and political behavior. Combined with the disappearance of "connections" targeting, which let us take advantage of social relationships by advertising to "friends of friends", Facebook's basic utility for the political world would seem to be shrinking.



The top of Bernie Sanders's Facebook page in April 2019

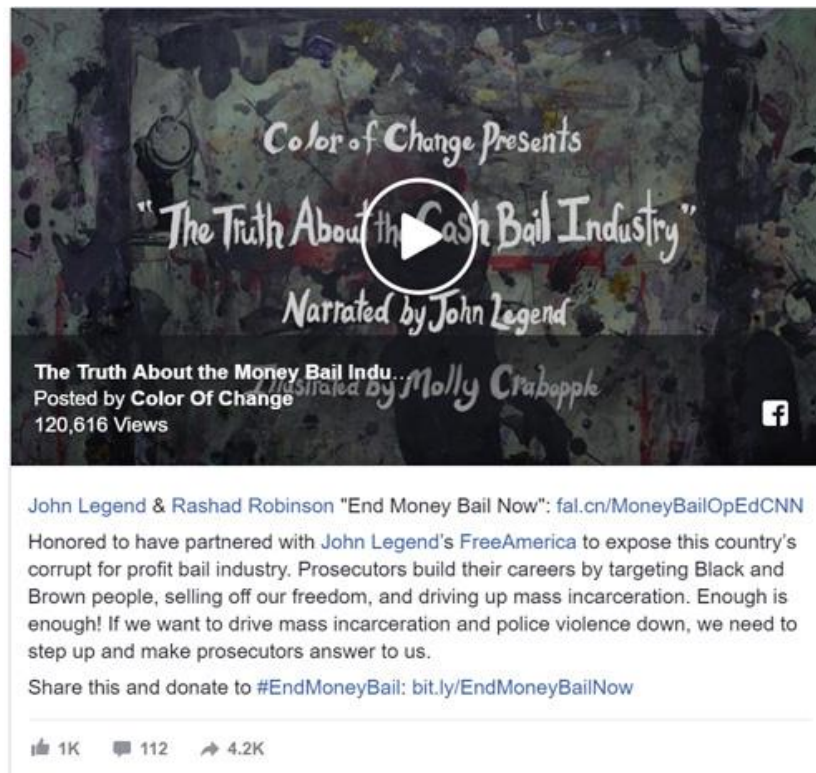
"Shrinking" doesn't "disappearing", though, and most political and advocacy campaigns and advocacy will set up Facebook pages. Not individual profiles, because pages can advertise and have no follower limits. Facebook pages are easy for campaigns to launch — you can fill in the essential information in a few minutes — but they require work to reach their full potential. Plus, most of the time: at least a little money.

## Breaking Through

Unfortunately, Facebook communicators of ALL stripes must assume that few of our followers are seeing our content by default. The now-legendary "Facebook Algorithm" determines what posts appear in users' news feeds, and [these days most of our followers won't even have the chance to see our stuff unless we pay for the privilege](#). In practice, campaigns and advocacy organizations will [rely on a mixed strategy](#) ensure visibility:

- Good content
- Active supporters
- Paid promotion

When you launch your page, build your network by inviting the candidate's friends, family and connections, plus party activists, local officials, bloggers, people on your email list, etc. From there, you'll most often rely on content-sharing and paid promotion to connect you with the people you need to reach. Note that [alliances with partners with large or relevant audiences](#) can be a huge help!



**Most of us cannot count on having videos from extremely famous people to post, unfortunately**

## Facebook Content Strategy

Good content underlies just about any Facebook outreach strategy. You can post regularly and encourage your supporters to share your stuff all day long, but if your content stinks, it probably won't help.

What should campaigns and advocacy groups post?

- **Photos, videos and other imagery like [infographics](#) whenever possible.** Facebook favors images and video and will usually show them to more of your followers (and their friends, if your followers share it) by default.
- News stories, videos, short notes — any type of text or image you might consider posting to your own profile, assuming the it reinforces your messaging.
- Photos and video from rallies, pictures of the candidate's family and stories about individual volunteers — anything to connect your supporters with the campaign in a personal way. Volunteer features can be a great way to reward people for their time and energy.
- Video live-streams
- Questions for supporters, intended to spark discussion. Ask people what they think!




**Joe Biden**    
 about 2 months ago 

The health of the American people is not a joke, Mr. President.



NBCNEWS.COM  
**Trump says he was being sarcastic with comments about in...**  
 The president has faced widespread condemnation for his suggestions ab...

 16K  
  6.4K  
  5.7K

**Joe Biden's campaign hits Trump over his off-the-cuff "ideas" about coronavirus treatment, an example of making the same points repeatedly but in different formats**

Facebook seems to be highlighting videos in part because it wants to wrest the title of Top Video Site from YouTube. As a result, videos posted directly to Facebook get much more exposure than the same ones published on YouTube and then posted to Facebook as a link — sometimes [reaching as many as TEN TIMES more people](#). As a result, it's now common practice for campaigns, companies and organizations to post their videos to YouTube and Facebook at the same time, the duplication of effort be damned.

Despite the bonus that photos and video receive, advocacy organizations and campaigns should think about telling their stories in as many ways as they can. Some people will respond to photos, others to videos or a juicy news story or narrative post. Facebook knows what they like and will show them more of it — we are all becoming an audience of one.



**Sen. Kirsten Gillibrand was one of millions of people who "rainbowed" their profile pictures in June, 2015 to celebrate the Supreme Court decision legalizing same-sex marriage**

### **The Importance of "Engagement"**

The more that people interact with your Facebook content (Like/Share/Comment), the more likely Facebook is to show it to them in the future. **Engagement now sets you up for engagement in the future.** So try to post engaging content....

From the moment you publish, Facebook measures the response of the people who encounter it in their news feeds. If they Like/Share/Comment at a high rate, the algorithm will reward the post with extra exposure. If they don't, you can count on reaching just about nobody.

Arguing against an engagement-focused strategy: Facebook content process takes time! You'll need to:

- Take the photos or shoot the videos
- Solicit and edit the stories
- Prepare the memes
- Write the status updates
- Edit the videos
- Set up the live-stream
- Post everything
- Monitor the conversation on the posts
- Monitor the stats

- Rinse, repeat

All of which takes staff or volunteers away from other tasks like raising money or talking with voters. But it's what works, at least if engagement is your goal. The experience of many campaigns, advocacy groups and corporate brands is that good content regularly posted can keep a page's fans engaged enough that Facebook will keep showing them your posts...for now.

In 2023, you may be able to [let an AI chatbot do some of the work](#). Need state-specific Facebook posts for a campaign rollout? Artificial intelligence platforms can churn out many variants instantly based on the criteria you give it. Be sure to check the results carefully, though — chatbots may reflect the patterns of human writing and speech, but their work output doesn't always reflect reality. See the Big Trends chapter for more on how AI and machine learning may change the ways campaigns do business.

Another way to make your life easier? When possible, Share good content from other Facebook pages, particularly content that seems to be performing well for them. These stories need to be relevant to your campaign or cause, of course, but if a particular image, video or link is working well for others, Facebook will typically give it a push when YOU post it. Sharing is caring...for your own sanity.

Like everything else in politics, of course, **Facebook engagement has its downsides!** When your content is shared widely, enemies can see it, too. Sometimes advocacy or campaign content can attract more negative attention than positive. When bullies pile on and pollute your posts with negativity, consider hiding their comments or targeting your content to limit the effects. A relatively small number of people can ruin an online conversation fast.

### **Is Engagement Worth the Time?**

[SHOULD engagement be your goal?](#) Considering the time involved, and the risk of blowback, it's a question worth asking. Campaigns must consider the time it takes to produce good Facebook content and weigh it against every other task those staffers and volunteers could be doing. AI may change the equation, but as of now there are no hard and fast rules: we have to think about our own particular strategies and the needs of our campaign or organization.

### **Tracking Facebook Content**

How do you know what content works for your particular audience? Your supporters will tell you in the form of engagement — Likes, Shares, Clicks and Comments. Which posts get the most response? Which ones do people choose to share? The latter is particularly important, since shared content exposes your page (and your campaign) to new supporters and voters. Fortunately, stats like these are relatively easy to track via Facebook Insights, as we'll discuss in the chapter on political data. Page administrators can quickly see which posts are turning the audience on and which leave them cold.

### **How Often Should You Post?**

Except in rare circumstances, try to post new content at least once per day, and more often if possible if engagement is your goal. Think about each piece of content as a chance to engage followers, with

more content equaling more opportunities to connect. If you can handle the volume, aim to produce three or four quality posts each day — a pace the presidential campaigns were maintaining in 2019. By contrast, the Trump and Biden campaigns were each posting six or seven times per day later in 2020. Note: take a photo any time your candidate interacts with voters! Think of all the exposure Elizabeth Warren received from [those long "selfie lines" in 2019](#).



**A good example of one organization sharing another's successful content. In this case, Vocal Progressives published the content and Occupy Democrats shared it**

Try to space your posts out in time if you can, since each one needs time to reach your followers before your next one steps on their toes. A gap of three hours between posts seems to be standard, and note that you can schedule posts in advance. If you can spend a few minutes scheduling content in the morning, you can create a stream of content throughout the day as you attend to other tasks. Pro Tip: don't schedule posts to go live on the hour or half-hour! Too many other communicators will use those defaults, and your content may have a better chance of standing out if it goes up a few minutes before or after.



**Content doesn't have to be fancy to do the job**

### **Targeting Content Posts**

Facebook knows where you live, where you access the internet, where your phone travels and who knows what else. Campaigns often take advantage of this rather disturbing fact to geotarget individual posts, similar to the ad geotargeting we discussed earlier. If you're inviting people to rallies in different states, for example, you may want to create state-specific posts visible only in those places. Similarly, a statewide campaign might employ city-specific posts, and you could conceivably go zip code by zip code (I once targeted a universe of ~1000 zip codes for a particular advocacy client). Without money or supporter zeal behind them, though, geotargeted posts won't reach many of your own followers, much less anyone else.

### **Facebook Communities**

As you build a following, your supporters will naturally interact with each other as they comment on your posts. Online communities can take shape quickly! But the internet being the internet, not everyone will get along. Be prepared to monitor the conversation on your page and to step in when necessary. Ban people if you have to, but it's often better just to hide offensive comments — the commenter won't even know it.





**Elizabeth Warren Facebook post from 2019. It rarely hurts to leverage the popularity of others**

Once you hit a critical mass of supporters, they'll often self-police — calling out unnecessary rudeness and shouting down critics, trolls and cranks. Trolls WILL find you, of course: they're simply a fact of life on social media. Watch for them, and don't let a small number of negative voices poison the conversation. If the community isn't able to shut them down, hide them first and ban them if they persist. No one invited them to your party.

**Page owners can create Facebook Groups** for back-channel discussions among the people who follow your page, which can help keep them engaged and connected. Once again, you may need to monitor the conversation. Things can get out of hand, for one thing, and things said in a Facebook Group do not always STAY in a Facebook group. The wrong comment could blow back on your campaign! Still, Facebook Groups can provide a handy forum for your most-committed supporters to talk with each other and to organize on your behalf.



Advocacy content doesn't have to have an "ask". Sometimes, you can just give your people something they're happy to see. Plus, beer

### Get 'em On Your Email List — Or Your SMS List

Final rule of thumb: [get your Facebook followers onto your email list or your SMS \(text-message\) list as quickly as possible](#). True fact: email and texts dominate digital mobilization, at least for now. Look for chances to put action alerts, petitions, contests and other opportunities to join your list out there and see who bites. Many won't take the bait, but you'll likely get more money and time out of those who do.



## Facebook Ads

Facebook may well take the biggest slice of digital ad spending even in 2023, despite the platform's well-known travails (Metaverse, anyone?). In part, that's because of how easy Facebook ads are to use: anyone with a credit card can push the "boost" button and see at least some results. Plus, all the targeting options we've discussed so far are available, including location, interests and demographics. "Men aged 25-34 in Hawaii who like football" would be a targetable group, for instance. As we discussed in the last chapter, Facebook ads automatically serve to your targets on Instagram if that's where they spend their online time and if you've chosen Instagram as a placement when you set them up.

Facebook/Instagram tracks our every interaction on their platforms: it knows who we know, what pages we like, what we share and what we search for, along with appended data about us from commercial vendors and the information it gathers from Facebook tracking pixels and share apps on sites across the web. This depth of data lets Facebook offer tools such as "lookalike targeting", which will put our ads in front people who "look like" our current supporters based on everything they've ever done on Facebook. Freaky.

As of 2023, most Facebook ads are "content ads" that appear in users' news feeds. Ads can serve several purposes:

- Driving engagement (Likes/Shares/Comments)
- Driving video views
- Driving app downloads
- Inspiring conversations via Facebook Messenger
- Email list-building via "lead generation" ads
- Recruiting new Facebook page followers

One big reason page owners [pay for distribution and engagement](#) is that whole "algorithm" question. Annoying as it is to spend money to have to reach people who've already chosen to follow you, once someone's interacted with your boosted content, they're more likely to see other posts from your page in the future. When they do, and your mind-blowingly good content compels them to Like, Share or leave a comment, they're more likely again to see your stuff again tomorrow or next week. Done consistently, boosting pays off in the form of more followers and more engagement over time — at least, that's the theory.

Promoted posts show up on users' Facebook phone apps as a matter of course, though you can choose to turn off mobile display when you buy them. **For many campaigns, boosting posts is a fast route to a mobile advertising strategy.**



Surreal but all too real: an ad purchased on Facebook as part of the Russian attempt to undermine the 2016 U.S. elections. More examples of [Russian ads](#)

### What To Promote

Most promoted/boosted posts are images or video with some text or a link attached, though beware the dreaded "20% rule": if you're promoting an image, no more than 20% of the area of that image can be text without affecting delivery. Annoying! Otherwise, you can promote just about any content you would post to your page.

Before you start a Facebook ad campaign, nail down your objectives. Are you ginning up engagement for its own sake? Are you recruiting people directly, asking them to Like your page? Are you hoping for content shares, with an eye toward reaching new supporters organically? Are you looking for link clicks, perhaps to an important news article? Are you driving people to an email signup or online petition, or trying to get them to show up for an event? In each case, choose content that seems most likely to entice people to take the act you want. Good images and video catch the eye, but be sure to make the "ask" as clear as you can.

Note that Facebook users see your ad even if they don't click on it. Since a few dollars can buy thousands of ad views ("impressions"), Facebook ads can convey at least some of your messaging to people who don't actually engage with them. In many cases, branding and messaging may matter more than Likes and Shares. **If you're running down-ballot, this kind of name recognition may make all the difference on Election Day.**

You can link your ads to a page on your website like your email signup form, but ads that send people outside of Facebook typically have a lower response rate than those that feature an action on the

platform itself. Facebook ads usually work best when people don't have to leave, which is one reason Facebook's native lead-generation ads have been a boon to email list-builders.

Once you have your content and your targeting lined up, set your daily budget and you're off. Unless, of course, you forgot to get approved to run "political" ads.

### **Political Ad Approvals**

Let's take a minute to look at that approval process, which of course may have changed completely by the time you're reading this book. But as of early 2023, campaigns need to take these steps:

- Create a Facebook page
- Create an advertising account linked to that page
- Have each staffer who'll be creating ads go through an individual approval process. Among other things, this involves uploading a photo of the person's ID (driver's license, passport) and entering a code number the staffer will receive in the mail. Theoretically, this verification ensures that only people from the country in question can run political ads in that country.
- Link the staffers to the Page
- Create a disclaimer for the page, identifying who's paying for the ads
- Link the disclaimer to the advertising account
- Link an Instagram account if you have one

Unfortunately for anyone who has to go through it, this process is both opaque and littered with landmines. Many people and organizations have found themselves stalled at one point or another for reasons that weren't obvious. **If you plan to run political ads on Facebook, start the approval process long before you need to place an ad.** Trust me.

After you're approved, each ad will still need individual review before it runs, and Facebook may block it for reasons that are again often opaque. Welcome to teeth-gnashing frustration, kids!



The image shows a Facebook post from Epolitics.com. At the top left is the profile picture and name 'Epolitics.com' with a 'Sponsored' label. To the right is a 'Like Page' button. Below this is a quote: "In a connected world, we can all serve as 'digital Minutemen', ready to take up phones and computers at a moment's notice to fight for what we believe." The main image is a neon sign that says 'Psychic' in a cursive font, with a glowing crescent moon above it. Below the image is the text 'EPOLITICS.COM' and a link 'Parkland Teens: The Future of Activism...in More Ways Than You Think » Epolitics.com' with a 'Learn More' button. At the bottom of the post, it says 'Margaret Summers, Jocelyn Harmon and 9 others' and '4 Shares'. Below the post are icons for 'Like', 'Comment', and 'Share'.

A promoted post linking to [an article on Epolitics.com](#)

## Testing and Optimizing Your Ad Buys

For the last decade or so, Facebook ads have been relatively cost-effective, but prices have jumped in the last couple of years. The cost is highly variable based on the specifics of your buy, and at least for now, [Facebook's price structure rewards success](#): the higher the rate at which a particular ad run is clicked, the less it costs over time.

As a result, Facebook effectively rewards experimentation. As with Google ads, Facebook advertisers frequently test many different combinations of images, text and targeting to find the final versions on which to concentrate resources. For inspiration, see this excellent case study of [how Facebook Ads helped defeat a Florida ballot initiative in all the way back in 2011](#). You can also use this approach to test campaign messaging, as we'll discuss in the chapter on Data and Analytics.

To create clusters of ads, you'll need to work through the Facebook Ads Manager in [Business Manager](#) rather than clicking the "boost" button on your posts. Typically, you'd create a Campaign and then an Ad Set, and clump the ads together in the set. Facebook will then allocate your budget among the ads based on how well they perform. Once you see what's working, you'll usually turn off the low-performers to focus your resources on the successful variants. If you're message-testing, though, you may want the slacker posts to persist so that you can gather data over a longer period. Likewise, you can set up your buy to ensure that each ad variant gets the same budget by placing each one it its

own Ad Set, again to track performance. Note that Facebook now offers built-in A/B testing, but many of us still set up our own testing campaigns without it, to better control variables.

Of course, if you were the [the Trump campaign in 2016 or many commercial brands of the time](#), you'd automate the process and potentially run many thousands of different ads per day. Early in 2021, though, Facebook began restricting the number of ad variants any one page could run at the same time, putting a limit to just how clever we can get. Bummer.

### When to Promote

Some campaigns will emphasize supporter engagement enough to pay to promote EVERY post, but others will reserve that privilege for higher-priority (or very timely) content. One approach: try promoting a few posts and see how it goes. Do they get significantly more exposure? Do they seem to bring in new page followers? If they do, promoting more posts in the future may be a cost-effective way to grow your page and keep your followers engaged. Pro Tip: the better a piece of content performs organically, the better it's likely to perform as a boost. **When possible, reinforce success, not failure!**

### Facebook Sidebar Ads

Facebook's sidebar ads have been around for years (as far back as 2009 [Epolitics.com covered their use in a local DC race](#)), and while they've been eclipsed by promoted posts, they still have a place. Sidebar ads consist of a small image, a headline and some text, and Facebook will generally create them automatically when you create promoted posts through the main ad administration interface, depending on the purpose of the campaign you're creating. Note that sidebar ads are desktop/laptop-only.



A sidebar ad for an advocacy organization, in this case featuring a video

## Facebook Recruiting Ads

Recruiting ads help you build a following for a Facebook Page on short notice. They feature an image, video or image slideshow, along with a (very) short text snippet and an invitation to Follow your page on Facebook. If you're growing your campaign, particularly in the early stages, recruiting ads can connect you with potential followers in bulk. For nationwide campaigns, cost-per-acquisition usually runs in the tens of cents per person. The more you need to target geographically or demographically, however, the higher the cost. Be sure to test your recruiting ads just as you would any other promoted content!

One advantage of recruiting ads over other formats: people can't leave nasty comments on your recruiting ads, which they can DEFINITELY do on your normal promoted posts. You can [run recruiting ads to find pockets of support in otherwise unfriendly territory](#) without having to monitor the discussion.



The image shows a screenshot of a Facebook recruiting ad. At the top, it says "Suggested Page". Below that is the profile picture and name of "Electric Nation: Powered By Wind", with a "Sponsored" label. The ad text reads: "Wind energy is clean energy! We're creating jobs & powering America into a new century." Below the text is a photograph of three people on horseback, seen from behind, riding along a dirt road towards a large wind turbine in a field under a blue sky. At the bottom of the ad, it says "Electric Nation: Powered By Wind" and "Cause" with "179,651 people like this". A "Like Page" button is visible in the bottom right corner.

**A recruiting ad for the [Electric Nation Facebook project](#) I was working on with the Wind Energy Foundation in 2018. This ad far outperformed six other variants in a test that summer, an example of the power of striking imagery**

## Buying and Targeting Facebook Ads

The easiest way to promote a post is to publish it and then click the "boost" button. If you're just targeting your own followers for engagement purposes, the options should be obvious. Note that local campaigns should be sure to look at geotargeting, though if your following is local, your boosted engagement posts will automatically be local as well.



For outreach beyond your existing list, use the "advanced" options to target Facebook users by criteria including location, interests, demographics or the pages they follow. Then, set your boost duration and budget and track the results. Trying to reach different audience segments? Use the advertising interface to create more than one post, with individual variants targeting the different groups.

To create clusters of ads, you always go through the Ads Manager in Facebook Business Manager. You can also use the ad interface to create an array of content ads that DON'T actually appear on your own Page ("[dark posts](#)"). They'll look like boosted posts, but they're built directly through the ad editor and are good for creating a series of different ads to target different areas or interest groups or to test different text and images. **Note that under Facebook's new political ad regime, ALL your politically themed ads will live for years in an online archive, whether they appeared on your actual page or not.** Your opponents' ads, too! A great tool for opposition research.

Agencies and others bulk buyers can also use an API interface to plug directly into the backend of the advertising system and transfer ad content and data in bulk.

**Mike Honda for Congress**  
Sponsored · Like Page

A new KPIX CBS San Francisco Bay Area poll shows that Mike leads Ro Khanna by 20 pts, despite Khanna squandering \$2.7M. Watch the clip from last night's news for yourself.  
Endorse Mike's re-election here: <http://wefb.it/eKjJtB>

**Congressional Race**

Rep. Mike Honda      Ro Khanna

6:08 PM  
**5**  
KPIX

**KPIX Poll Shows Mike Honda With Strong Lead In South Bay Congressional Race**

A KPIX 5 phone survey taken this week showed strong support among South Bay women and seniors for incumbent Rep. Mike Honda (D-San Jose) in his 17th...

[SANFRANCISCO.CBSLOCAL.COM](http://SANFRANCISCO.CBSLOCAL.COM)

Like · Comment · Share · 692 99 76

A promoted post via [Beth Becker](#), this one from a Democratic primary fight in California. Note that the campaign is promoting a story from a local TV news station but includes a link back to its own site as well

## Facebook Custom Audiences

Right before the 2012 elections, Facebook unveiled a new feature called "custom audiences" that [connect your email list and Facebook users](#). A custom audience is a list of email addresses which you upload via the ad interface, which Facebook then matches with the addresses it has on file for users. A few political applications:

- Upload a list of your existing supporters (or a subset of that list) to target them with GOTV or fundraising ads within Facebook.
- Use that same list to EXCLUDE your supporters from an ad buy, for instance to save your recruiting dollars or their patience.
- Target the recipients of a particular fundraising email before it arrives, hoping to bring in more donations.
- Target a list of voters.

Of course, custom audiences aren't perfect, since they'll only work well if the people in question used the same email address or mobile number in Facebook that you have in your custom audience list (note: the more detail you can include about them, such as name a zip code, the better). Typical match rates are in the 40-70% range, though, and they've turned out to be a useful tool for many campaigns, particularly when paired with lookalike targeting (see below) for audience expansion.

Exporting a list of targeted people from a voter file and uploading them as a custom audience to target with ads has become a standard practice for campaigns in the U.S. Voter-file exports frequently lack unique identifiers such as email addresses and phone numbers, though, and Facebook often has a hard time matching them with its users. In the 2020 cycle, I personally found that Facebook could only match 25% or 30% of a typical voter list. Unfortunately, Facebook only tells you that you have a problem if it can't match more than roughly a thousand members of your audience. Be aware that you ads may reach a lot less people than you think, if you don't have enough data about your targets. Note that some data vendors will sell you a list of voters already matched as a custom audience, which may eliminate the problem entirely.

## Facebook Lookalike Targeting

As we mentioned earlier, lookalike targeting uses a custom audience as the basis for outreach to "similar" people, with the assumption that they're more likely to be interested in your issues than a random sampling of the population (you can choose the "lookalike percentage — how closely the new people resemble the ones on your list — during setup). When you upload your supporter list and choose lookalike targeting for recruiting ads, you can turn a small list into a bigger community in a short time.

Or, you might upload a list of your donors and use lookalike targeting to try to expand your fundraising base. I've heard from several colleagues, including ones working overseas, that custom audiences + lookalike targeting have become their key combo for list growth. Apple's recent iOS privacy changes have made this tactic less effective for fundraising, however, since they deny

Facebook some of the data it uses to identify lookalikes. In 2022, I talked with fundraisers who'd seen their returns drop by a quarter or more since the privacy changes had come into effect.

### **Engagement Retargeting**

One last option: engagement retargeting, which typically happens one of two ways. First, a campaign might target people who've engaged with a particular piece of Facebook content, as the Trump campaign did at scale in 2016. Or, the campaign might target people who've landed on its website via a "Facebook pixel", which gathers information about site visitors (audiences derived from a Facebook pixel can also serve as the basis for a lookalike audience).

Commercial marketers frequently use retargeting to harass people who visit websites but don't buy anything. Campaigns may consider retargeting to connect with reporters, activists and potential donors who've checked out the candidate online but who may not have Liked the Facebook page or joined the email list. Nonprofits and campaigns alike may also retarget people who start to make a donation but don't finish the process. Hound 'em until they give! It's good for them, really.

# 11. Twitter

---

[Twitter!](#) As a bit of history, Barack Obama had all of about 100,000 followers by Election Day 2008, a number that rose above 20 million by 2012. For a few years afterwards, the really important changes for campaigns involved one name: Trump. From the instant he joined the presidential race, [Donald Trump began to transform the platform, making his feed a personal bullhorn](#) and a bullwhip against his rivals. The effects rippled out into general news coverage, and by 2018, no political story seemed complete without at least one tweet embedded or quoted. Of course, Trump lost his own Twitter soapbox in January 2021, at least temporarily, after he finally Went Too Far and [got himself banned](#).

2022 brought a new name into the equation: Elon Musk. When the tech zillionaire bought Twitter, he quickly started firing staff and restoring accounts that had been shut off by the previous administrators. Without enough techies to take care of them, some site features began to fail or at least seem a bit creaky. Meanwhile, some users, particularly on the political left, decided to leave the platform entirely.

Despite the chaos, Twitter's place in the political firmament seems at least somewhat secure in 2023. [As I put that February](#), "Twitter under Elon Musk [remains one tantrum away from destruction](#) at all times, but [the platform's overall traffic hasn't dropped as much](#) as boycotters might have hoped." Unless something changes dramatically, political communicators will still need to keep Twitter in mind.

Though Twitter merges with Facebook as "social media" in the popular mind, tweeting isn't quite a mass medium in the same way Facebook is — it's more of a channel to reach [influencers](#), [journalists](#) and activists. Also different from Facebook? You can pretty much post as often as you want on Twitter. Note that many communities of interest have organized around the platform: ["Black Twitter" played a big role in the evolution of the Black Lives Matter movement](#).

Functionally, Twitter is the very short equivalent of blogging, with a dash of social networking thrown in: individual Twitter posts (**tweets**) are limited to **280 characters in length** as of this writing (though some people will [pay for upgraded accounts](#) that allow much longer tweets), and people historically have to choose to "follow" someone's Twitter feed in order to see their updates (a situation that may be changing as of this writing). As with Facebook, essentially anyone or any organization can create a Twitter feed, but in some sense Twitter lacks the reciprocal nature of a true social network — plenty of feeds have thousands of followers but follow far fewer people in return (do you think Kanye really paid attention to what you said?).

Note that "280" number. From Twitter's birth until [November 7, 2017](#), tweets were famously 140 characters long and that was it. Some predicted Doom when the platform announced the new standard, but if anything it seems to have made Twitter more meaty and useful. Also helpful on that front? The ability to **connect several tweets into a thread**, again allowing a more-substantive presentation of ideas.



This is Trump's brain on Twitter. Photo by [Gage Skidmore](#)

One important consideration — Twitter's a useful tool for campaigns, but its real political power may lie in what most campaigns CAN'T do on it, which is to dominate the conversation. Twitter is truly a democratic medium (with a small "d"), and content and opinions put out on Twitter often find their way onto the airwaves. In a real sense, Twitter helps create the sea of information in which modern campaigns swim, whether they're active on the platform themselves or not.

Quick history lesson: way back in 2012, [Obama and Romney campaign staff regularly engaged in "Twitter duels"](#), with reporters and activists the intended audience. Though these back-and-forth exchanges probably didn't change any votes themselves, they got plenty of media attention. Mission Accomplished!

### **What to Tweet?**

A common perception of Twitter: it's an inherently trivial medium, a way to tell the world what you had for breakfast. But in practice, normal people who fill Twitter's "airwaves" with self-indulgent drivel generally don't pick up much of a following (for celebrities, that's unfortunately NOT so true). In fact, perhaps the most common single use of Twitter is to spread links to blog posts, videos, news articles and other pieces of in-depth content.

Once again, though, people aren't likely to pay much attention to you unless you have something of value to offer them. Those who tweet too little of substance too tend to lose attention fast, so it pays to be deliberate in the KIND of information you distribute. Not every tweet needs to be a haiku-like gem of wisdom, but it rarely hurts to think for at least a minute or two about your ultimate communications goals before messaging the world. How often people Tweet varies immensely — I

have friends who've sent out 10 or 20 times more messages over the years than I have, for instance. It really depends on what you have to say and who wants to listen.



**Kamala Harris's Twitter page on a browser in April 2019. Note the SMS shortcode in the description on the left**

Note that as of April 2023, [artificial intelligence-driven chatbots](#) may change the way a lot of us write tweets! AI will crank out text variations and even images with wild abandon, based on what you ask it to do. As we discussed in the Facebook chapter, though, you'll need to review the results carefully to make sure you don't publish something wrong, horrifying or otherwise inadvisable. See the Big Trends chapter for more.

## Visual Content

Much like Facebook, Twitter has evolved into a visual medium, with many tweets including photos or video. With that in mind, to make sure your website content looks its best when you tweet it, be sure to install [Twitter "cards"](#) on your site, which pull rich media content like images and video from your website and display it in your tweet. Most website hosting platforms and services include this option automatically or as a quick add-on.

## Building a Following

Once you've established an initial base of content on Twitter, start building your following. Unfortunately, short of being mentioned in the Twitter feed of someone famous or paying for followers, finding an audience takes time.

Start building your Twitter presence by following the people you want to follow you. If you're a campaign, that means your staff, political activists in your state/region, local bloggers, journalists, etc. If you're an individual activist or an advocacy organization, the logic will be similar but the targets may be different. Some of the people or organizations you follow will follow you back, and even they don't, you'll be able to keep an eye on their tweets and potentially entice them into a conversation.

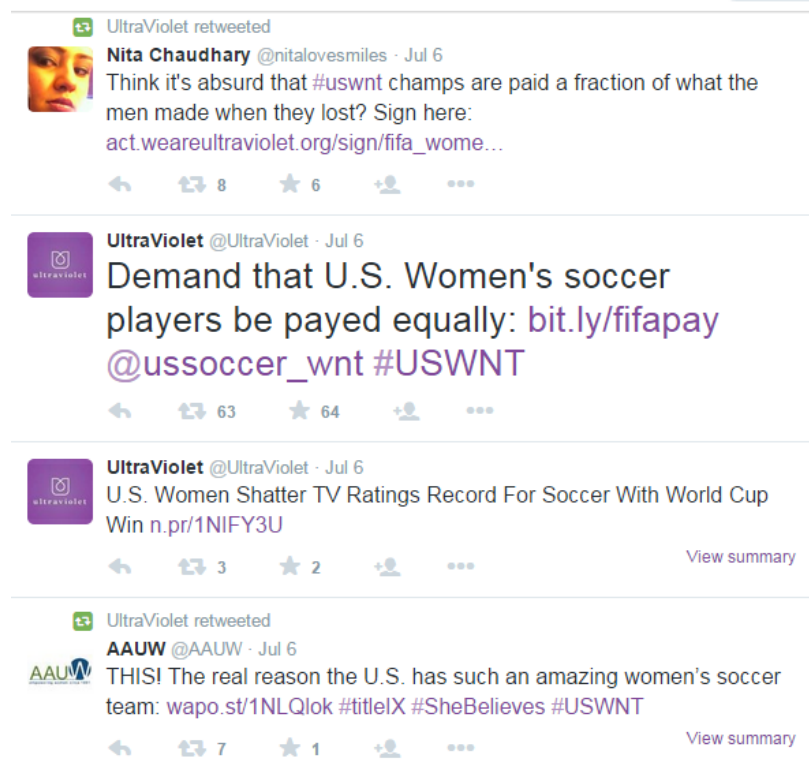
## Supporters = Ambassadors

Naturally, you'll want as many of your campaign supporters to follow you as well, particularly if they are popular, active and/or respected on Twitter. So ask them! A "follow us on social media" email is a nice break from a string of fundraising asks, and your supporters may appreciate a chance to help the campaign without having to open their wallets. And every time they share your content on Twitter, they're acting as ambassadors to their own followers.

## @Replies and Hashtags: Engaging the Community and Connecting with Prominent Voices

Over the long term, one of the most effective ways to build your following is to actively engage the Twitter community. The most straightforward method is to use an "@reply," in which you reference another Twitterer in your own post (i.e., "@epolitics why don't you just shut up about this crap"). You can use @replies to hold a back-and-forth conversation with someone, and they're a good way to get the attention of a user with whom you'd like to connect. Management tools like Hootsuite and TweetDeck make it easy to keep an eye on individual influencers you want to connect with, as do Twitter Lists.

You can also @reply someone when "retweeting" them, forwarding their posts to your own followers. Retweets ("RT" in the old days) are one of the signature characteristics of the ongoing Twitter conversation, since they let us provide value to our readers without having to write new content ourselves. Plus, retweeting someone more prominent can be a way to come to his or her attention. Add a comment to your retweet to include your own perspective.



A series of tweets and retweets from [the feed](#) of advocacy organization Ultraviolet a few years back

Besides RT's, the other common bit of Twitter shorthand you'll commonly encounter is a "hashtag," a word or abbreviation preceded by the "#" sign. Twitter users employ hashtags to refer to a topic being discussed by several people at once. They identify tweets about an issue, event, public figure, controversy or other topic, and you can use Twitter's search function (or TweetDeck/Hootsuite) to follow the extended discussion around a particular tag. Hashtags CAN be a valuable way to gain exposure to new followers and to find yourself retweeted, assuming of course that you have something interesting to say. Some websites attempt to keep track of common hashtags, but the easiest way to find the hashtags in general use is to search Twitter around a topic and look for the ways people tweet about it.

You can create your own hashtags around an event or messaging theme, but beware: hashtag "hijacks" are a common practice. Your enemies will love a chance to start [using your hashtag for their own purposes](#), usually AFTER you've put a lot of effort into making sure that people know about it (for a particularly frightening example, see [QAnon and #SaveTheChildren](#)).

Engaging the Twitter community can be time-consuming, since you usually have to pay attention to what many different people are saying — most of us aren't famous enough to influence the conversation unless we're actually listening to others. Hashtags, Twitter searches, Twitter lists, Hootsuite and TweetDeck can all help you break the feeds you're following down into groups, perhaps based on what the users talk about or who they are (hint: track relevant journalists). Management tools also tend to speed up the process of scheduling and posting content vs. going through Twitter.com itself.

### **Direct Messages**

Twitter is a messaging service, too! You can Direct Message (DM) someone behind the scenes if you follow each other — a good reason to follow reporters, bloggers and activists and encourage them to follow back. I've known people who've been able to connect with a reporter, source or vendor via DM whom they couldn't reach any other way.

### **Advanced Tactics**

Twitter has given rise to an impressive array of different tactics and practices. "Live-Tweeting" an event involves covering it comprehensively as it happens, and social media-friendly conferences and seminars typically promote the use of certain hashtags to facilitate the process. Activists or groups can also pre-arrange TweetChats, which are public discussions at a particular time and around a particular hashtag. Many people pay attention to the hashtags that are "trending" on Twitter, i.e., becoming widely discussed, and the goal of a TweetChat or live-tweeting is often to either encourage a topic to trend or to ride the wave of a subject that's moving up the popularity ladder. Finally, a Twitter interview can be an interesting way to run a one-on-one public conversation, though it practice it can [feel like competitive poetry](#) or a freestyle rap showdown — i.e., a public balancing act on a very narrow wire.





**Cory Booker** ✓ @CoryBooker · 19h

Blessed to meet with such an inspiring group of women today. The generous hospitality they showed to me and my team while sharing personal, harrowing stories of our immigration system is a lesson for us all about common decency, humanity and family.



52 60 400

**Cory Booker tweet from 2019. Note the attempt to make the tweet more about the people he was meeting than about him, though he is clearly the center of attention in the image**

### Twitter and Mobile

A common question about Twitter: why the original 140-character limit? The answer is cell phones — Twitter was limited by the length of SMS text messages, making it one of the first online organizing tools that commonly and easily worked on handheld devices. Organizers were quick to advantage of this fact to employ Twitter to help rally communities in which cell phones were more common than access to the traditional internet. Others quickly turned to the mobile app for on-the-spot live-tweeted and live-streamed coverage of rallies and other events.

### Warning: Ways to Stumble

The most important Twitter rule to remember? [Don't be an idiot](#), since something you post on Twitter will live forever, even if you try to delete it (just ask Anthony Weiner). Even if you're smart enough not to send topless photos over the internet, a big mouth can still get you into trouble. As a friend of mine [once said of a Democrat challenging Sen. Chuck Grassley](#), "as long as he has a Twitter feed, she has a chance."

Another note of caution: electoral campaigns may need to be 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 sometimes take a hit. Finally, don't forget that 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 and let it die of neglect.

Want more Twitter tips? Check out [the advice Rep. Alexandria Ocasio-Cortez had for her House Democratic colleagues](#). It's all about authenticity, my friends.

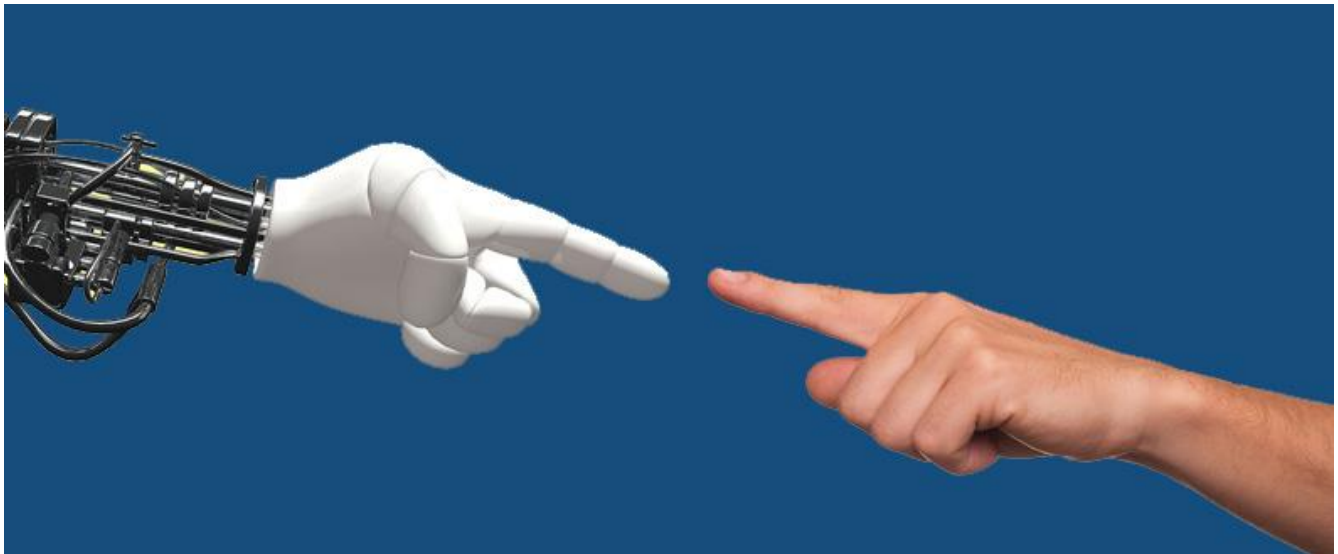
## Livestreaming Apps

Twitter livestreaming made a big splash in 2015, with the Meerkat app sparking buzz at that year's South By Southwest Interactive conference. Since then, Twitter's own app has taken over live video on the platform. While livestreaming has [played a role](#) in [political activism](#) and [organizing](#), the worst of the hype seems to have faded somewhat. Look for Twitter livestreaming to be useful but not necessarily transformative for campaigns in 2023 and beyond, as we discussed earlier in the video section of the Infrastructure chapters.

## Bots, Hacks and Trolls

Twitter bots ([automated accounts](#)) are playing in elections around the world, including in America and the U.K. As of this writing, Twitter is regularly deleting some "fake" accounts, but many will no doubt appear between now and your next election. See [this article from Campaigns & Elections for more about bots and hacks](#), particularly the Russian versions. Please, please, please [do not ever employ a botnet yourself](#).

Likewise, Twitter "trolls" may hunger for an opportunity to waylay you online, perhaps to take some statement by your candidate out of context and blasting it into the aether. Twitter monitoring should help you spot a troll-swarm in the making, but how should you respond? Actually, the best defense is a lot of defenders: mobilize your supporters (grassroots and grasstops alike) to push back against attacks, and do your best to stay out of the fray.



## Twitter Advertising

As of this writing, Twitter HAD banned political promoted tweets for a couple of years, but they are apparently returning under the Musk regime. We still don't know all of the details, though, and the rules may have changed again by the time you read this book.

Assuming you can access it, Twitter advertising gives campaigns and advocates sophisticated and useful options to influence the online conversation. Twitter's particular strength? As we discussed above, it's primarily an "opinion leader" medium, and it offers opportunities to reach people who can shape the public narrative around a race or issue.

The most common Twitter "ads" take the form of "promoted tweets" — tweets that you pay to get in front of more eyeballs than they would reach on their own. Some options:

- Geotargeting by metropolitan area or zip code
- Targeting people following a particular hashtag (which I have used successfully to promote the book you hold in your hot little hands, particularly when I've targeted activist conferences)
- Targeting the followers of particular feeds
- Targeting users' interests or the topics they tweet about
- Targeting OF particular feeds; i.e., serving ads to individual Twitter users through a list you upload — similar to a Facebook custom audience
- Lookalike targeting: reaching people who resemble the people who follow a particular feed or a list you upload, again much like Facebook's lookalike targeting
- TV targeting: people who engage around particular TV shows (Sunday morning political talk shows, for instance), via hashtag.

Want to get creative? Try targeting political reporters and bloggers in your state to keep your messaging at the top of their feeds every time they go to Twitter. Or, try reaching out their FOLLOWERS, under the assumption that they're the politically minded folks you need to persuade or recruit. Interest targeting? Likewise, pick the right topics or hashtags to catch the right eyeballs. Other ideas: GOTV messages to priority audiences, post-debate spin aimed at the chattering class, highlighting a new campaign message...you get the idea.



**Will Conway** @heywillconway · Jun 26

Relationships drive it all. "3 principles of a successful political fundraising program" [nationbuilder.com/fundraising\\_pr...](http://nationbuilder.com/fundraising_pr...)



← ↻ 16 ★ 34 ...

[View photo](#)

Promoted by NationBuilder

### **A promoted tweet for political tech vendor NationBuilder**

You can also pay Twitter to promote your feed and grow your following, which may be useful for someone trying to grow a base of support fast. Most communicators will focus on promoted tweets, however, since they both recruit and persuade — let the feed grow organically.

As always, though, your results will depend on the content you choose to promote: a crummy promoted tweet is still a crummy tweet.

### **Buying Twitter Ads**

Promoted tweets and feeds are easy to buy; just poke around your Twitter feed and I'll bet you'll find an "advertise" button pretty quick (if not, Mr. Google can help you find the right page). The targeting process is actually quite intuitive — you'll figure it out right quick if you fiddle with it. Note that most flavors of Twitter ads are pay-per click.



## 12. Data-Driven Grassroots and Field Organizing

No aspect of political campaigning was upended by the covid pandemic as much as field organizing. With rallies gone and face-to-face interactions strictly limited for a year or more, organizers were forced to adapt to a world in which their most effective tactics were largely off-limits.

The field was already changing fast, though: cell phones have partly replaced printed-out "walk lists", and data-driven targeting has revolutionized the mechanics of contacting voters. Covid only accelerated the adoption of newer technologies, including the peer-to-peer texting and "relational organizing" tools described below.



**We never quite needed these, but still...**

### How We Got Here

Field organizing has deep roots in American political culture, but it had dropped out of fashion in much of the campaign world in the 1980s and '90s. Politics moved to television, and the public's job was to soak in the ads and vote appropriately. Fortunately for democracy, digital tools have reinvigorated field organizing over the past twenty years-odd years, starting with some early work on both sides in 2004. Four years later, Obama's [massive national grassroots operation](#) proved decisive.

Next, this approach moved down-ballot. In 2010 in the senatorial special election in Massachusetts, Republican Scott Brown and Democrat Martha Coakley deployed tools that leveraged the internet to improve on the classic on-the-ground campaign activities of block-walking and phone-banking by connecting individual volunteers with information from the Democratic [Voter Activation Network](#) (now NGPVAN) and the Republican [Voter Vault](#). Both campaigns made it possible for supporters to phone-bank from home, with Brown using [technology from an independent vendor](#) and Coakley an equivalent developed by the Democratic Party to connect volunteers with potential voters via phone without disclosing personal details in the process.

Both Massachusetts campaigns also produced database-generated walk lists for local volunteers to use while canvassing their communities, and Brown supplemented them with [a web-based application](#) optimized for iPhones. By geo-locating users through native iPhone features, the app could show volunteers the nearest house to visit, directions to get there and talking points to use during the conversation.

Once they'd gathered the responses, [organizers entered them into a Google Docs spreadsheet](#), a free online tool that helped the Brown campaign assemble the kind of granular data that [benefited the Obama campaign during the 2008 and 2012 races](#).

In 2013, Virginia's Democratic campaigns demonstrated [a different level of field sophistication](#), with 200 staff based out of dozens of offices across the state, where they oversaw data-driven grassroots outreach that included 13,000 volunteers knocking on doors the weekend before Election Day alone. Fast-forward to 2017's special election in Alabama, and [texts and targeted ads fell like Southern rain](#) as that state prepared to deny Roy Moore a seat in the Senate.

Particularly valuable: a ["voter data feedback loop"](#) much like Obama's, in which Democrats used data models to target their field and online outreach and then fed the information generated by voter contact back into the models. The result? In the case of Virginia in 2013, victory in tight statewide races — including an Attorney General race won by literally dozens of votes. (Caveat: these systems don't perpetuate themselves on their own, and Virginia's [evaporated quickly](#).)

By 2018, political races played out against a complicated grassroots backdrop. On the Democratic side, the party planned to [contact at least 50 million voters directly](#), supported by the many of the array of groups affiliated with the Trump Resistance. Meanwhile, overflowing with cash in part [derived from Trump's social-media-recruited small-donor list](#), the Republican party and outside groups [poured money into field organizing](#), mainly to [protect vulnerable House members](#).

In 2020, the Trump campaign (with a grassroots-organizing emphasis it did not possess in 2016) faced off both against Joe Biden AND a huge variety of Left-leaning organizations hoping to mobilize specific segments of the electorate. Trump's advantage? He allowed his campaign to go door-to-door, while Biden generally restricted his volunteers to remote outreach, a decision that some down-ballot candidates blamed for their own defeat.

In 2023, with the pandemic slipping out of mind, field organizers will work to contact, persuade and recruit voters whether their own areas have significant elections or not. Political groups are (slowly, painfully) learning [the value of sustained, long-term local organizing](#), Georgia-style.

**Field organizers will also be experimenting with artificial intelligence tools this year!** AI-driven chatbots may help churn out walk lists, process spreadsheets, create talking points for volunteers and other tasks we haven't thought about yet. Always check the AI's work, though — see [this April 2023 article](#) and the Big Trends chapter ahead for more.

# BE A PART OF THE **GRASSROOTS VICTORY PROJECT!**



Page heading image on the Democratic Senatorial Campaign Committee's 2014 online organizing toolkit

## Field Team Structure

What does grassroots look like? If you're going to create a robust grassroots operation, it never hurts to look at the best for inspiration. And of course, one excellent model we have is Barack Obama's twin presidential campaigns. From the "[Learning From Obama](#)" ebook about the 2008:

---

### Volunteer Management — Context, Training and Accountability

How the Obama field operation organized their volunteer teams deserves special mention, in part because their grassroots GOTV technology depended on it and also because it provides an excellent model for community-based organizers of all flavors. The structure evolved in the primaries and went national during the general election season. Its critical features:

- The campaign developed a clear team structure for the volunteer operation, replicable just about anywhere and with standard roles for each member. Each volunteer team included a leader (to hold everyone accountable), a data manager (because data doesn't exist unless it gets in the system), a phone bank coordinator, a campus coordinator and a volunteer coordinator.
- Training was absolutely vital, both for team members and for the individual neighborhood volunteers they organized.
- Teams had clear vote-getting and voter-contact goals and were held accountable for them.
- Example: for the general election, the 2008 Obama organization fielded 400 teams in the state of Missouri, supervised by paid campaign staff, with each team covering 8-12 voting precincts and starting work weeks or months before November 4th.

One thing stands out about this system: it required a lot from volunteers, both in terms of training and in actual sweat. To keep them working, the campaign was careful to let them in on the kind of strategy details that campaigns usually strive to hide.

One trick to motivating people: let them know how their efforts fit into a larger framework, in this case via David Plouffe's online video briefings, so that they know that their work has context and is actually valued. If you want to create a successful national grassroots outreach effort, focus on context, training and accountability. I.e., take your people seriously and they'll return the favor — they want to know that they aren't just blindly making calls or knocking on doors.

---

Note that much of the training discussed above took place via online video, particularly in areas outside of battleground states, where the campaign invested less in on-the-ground staff.

What about 2012? Obama again relied heavily on data-driven field, and the basic structure didn't change — though of course [his campaign team steadily refined their practices to create a more-efficient machine](#).

## Mobile Technology

With the computing power of cell phones increasing with every shiny new model, campaigners across the world have found creative ways to use them for political mobilization. For campaigns, canvassing apps like ActionBuilder and NGPVAN's MiniVAN will direct volunteers to specific houses, provide talking points (sometimes tailored to the individual voter), facilitate email/text signups and provide an immediate way to record the voter's responses to questions and update the campaign's voter file. Field + mobile = a data-geek's dream.

Virtual phone banks provide another powerful way to put supporters' time to work, since they allow people to make calls on their own schedule and without having to go to a campaign office (they depend on the fact that most of us have spare or unlimited cellphone minutes). Some virtual phone banking systems are web-based, but others employ a smartphone app — which you use depends on your technology vendor and the preferences of your supporters. Note that virtual phone banks were ubiquitous in 2020, since most volunteers were reluctant to sit shoulder-to-shoulder in a pandemic.

As an alternative to platform-specific grassroots/canvassing apps, many vendors employ mobile-optimized websites. These provide similar functionality without requiring different technology for iPhones, Androids, etc.

## Peer-to-Peer Mobile Tools

Now ubiquitous on campaigns, P2P texting apps allow volunteers or staff [to send individualized texts to many people](#) almost simultaneously from a single phone. As I put it [back when P2P was fresh and new](#),

Many political organizers are turning to "peer-to-peer" communications tools. Rather than broadcast information en masse, these platforms rely on direct connections between individual people. Most often they're mobile-centric, targeting the smartphones now in nearly everyone's pocket or purse.



...

They often rely on text messages, since people are far more likely to read a text — whether from a stranger or a friend — than to take a random call or open an email. One such tool, called [Hustle](#), broke big in 2016 when the Bernie Sanders campaign used it to manage communications among field organizers and volunteers.

Hustle is designed to automate the process of people texting people. When a volunteer installs the app, a campaign can push contact lists to them, like a phone-banking application, but for high-speed texting. More significantly, the Sanders campaign also used it to help field organizers communicate with many volunteers simultaneously.

When someone signed up for volunteer shifts via the Sanders campaign website, they might get a text from a local field organizer via Hustle, the first in a regular stream of communications between them. By making it easy for organizers to talk with many people at once, Hustle helped field staff build relationships with local volunteers at scale.

Hustle now has plenty of competitors on all sides of the political world, happy to offer you similar ways to communicate with voters, supporters, volunteers and donors one-on-one at scale. Note that P2P texting allows campaigns to OVER-contact people, which may one day create a backlash. Try to keep your targets' overloaded phones in mind when you schedule your texts to unsuspecting voters, particularly in battleground states or districts.

## Relational Organizing

As campaigns try to reach more people more effectively with every election cycle, "relational organizing" tools have emerged as a possible way to help field organizers do their jobs. Various platforms explore different approaches, but many revolve around the idea that a campaign's outreach works best when delivered by someone a voter already knows.

The digital angle comes from data: via a voter file, a campaign now has information about essentially every voter in its state or district. It also has staff, volunteers and the candidate, who have connections with at least some of those voters. The trick lies in connecting the two! As [Dave Leichtman](#) noted in [Campaigns & Elections](#), the goal is to find "for every voter who's the best person in their network to contact them, and what's the best way to do so."

Dems were first out of the gate with the new generation of relational tools, propelled in part by funders such as [Higher Ground Labs](#), whose portfolio also provides [a nice overview of the options](#) open to progressives and Democratic campaigns. [On the Republican side](#), with [Startup Caucus](#) hopes to jumpstart the Right in the way that Higher Ground Labs has the Left.

As with any ambitious technology, field trials have of course found some software bugs or even problems in some platforms' underlying organizing model, but the technology is evolving furiously. Campaigns large and small put relational organizing approaches to work in 2020 in part because they make intuitive sense: as Dave Leichtman [points out](#), relational organizing is really just retail politics at heart.

## Social Tools for Field Organizing

Field organizers can obviously use Facebook, Twitter, Instagram and TikTok individually, integrating them into their regular outreach work in the same way that activists around the world do when organizing protests and rallies. Also potentially useful as an organizing tool? Dedicated platforms that use a social model to create behind-the-scenes channels for field organizing. Some employ "gamification" tactics, for instance rewarding volunteers with "points" for activities like showing up for volunteer shifts or posting content to social media. For more on both of these developments, see [this past \*Campaigns and Elections\* column](#).

## 13. Mobilization and GOTV

---

Mobilization is simple in concept: it involves **persuading people to do things you want them to do** — donate, vote, volunteer, make phone calls, whatever. But first you have to ask, and therein lies the rub: how do we help our supporters realize their true political potential?

### Motivating Donors and Volunteers

If political support ultimate comes down to emotion — how a potential donor or volunteer feels about a candidate, race or issue — each contact people have with a campaign influences their desire to give time or money. Every interaction matters: their experience at an in-person event or a storefront office, the ads on their TVs and radios, what their friends are saying and of course what they see online. Successful digital organizers 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). Unless you're entirely short-term and don't mind burning bridges, properly managing and motivating supporters over the course of a race or the life of an advocacy campaign should be paramount. List size matters, and political organizations should take every opportunity to grow their own, but list response is just as important. **A relatively small number of motivated people can outperform a much larger group whose members don't have much coordination or reason to care.**

### Supporters Are Not Cash Machines

An excellent way to drive people away over time is to treat them like ATMs with legs, something entirely too easy for political professionals to do. In fact, early in the 2008 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, personal connection, information and giveaways. They should also think of non-monetary ways supporters can contribute. Getting people to recruit three friends via email or text, 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.



Typical internet user. Image: ©iStock/efenzi

## The Ladder of Engagement

A common approach to supporter management: provide activists with [escalating levels of involvement](#). Like the rungs of a ladder, reaching each higher engagement level requires more steps and more commitment. Ideally, though, it also creates more value for the campaign or cause. Over time, [list managers will obviously encourage people to jump to higher tiers](#), converting casual members into donors, donors into volunteers, and volunteers into precinct leaders, though some volunteers will come it at the top on Day One. With a sophisticated CRM or volunteer-management system, 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, find a way to involve people who AREN'T actually doing the shooting and editing, perhaps 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.



Typical digital activists

## More Than Money: Mobilization Means Votes

Regardless of your level of technical sophistication, you can use online communications to mobilize the masses to perform just about every traditional political task — and plenty of new ones, too. Among other things, campaigns can ask people to:

- Show up for in-person events (rallies, house parties) and invite friends and family.
- Volunteer at local offices.
- Phone-bank, either at a campaign office or over their own cell phones ("virtual" phone-banking).
- Connect with their neighbors door-to-door (canvass).
- Spread the word about a fundraising push.
- Recruit friends via email, Facebook or Twitter, or Like/Share/Comment on campaign content.
- Share a video clip, infographic blog post or other online content virally (social media profiles = "virtual yard signs").
- Put up (actual) yard signs.
- Create content such as blog posts, Tweets or online videos all on their own.
- And of course, **vote!**

The importance of that last bullet cannot be overstated for down-ballot candidates, particularly if they're trying to buck a national trend in their own districts. The chapters on Field Organizing and Data/Analytics go into detail on how a modern, data-driven grassroots operation can make a real difference on Election Day. [Pro Tip: don't forget online GOTV ads!](#) For more, check out [A Quick and](#)



**Bernie Sanders** @BernieSanders · 19h

Next Saturday, April 27 is the day our campaign begins the work of organizing to win this election. Have you signed up yet to attend an event in your neighborhood? Find one near you at [map.berniesanders.com](http://map.berniesanders.com)



119 327 1.1K

**Online mobilization tied to real-world events**

## Rapid Response

Earlier we discussed the role of online video in "flooding the zone" to push unflattering content down in search results, but this kind of online pushback doesn't spread person-to-person on its own. When the political shit hits the fan, a campaign's supporters can be its best defense. For one thing, people tend to make political decisions based on the opinions of friends and family. How they react to a scandal or other negative event may be filtered through what's said by people they trust.

If your supporters are out there speaking on your behalf, either in person or on Facebook, Twitter, TikTok, Instagram or their own blogs, it's likely to be a better defense than any "facts" you can muster. As a cautionary example, though, Obama '08 went to great lengths to [recruit their followers to fight back against the Manchurian Muslim Candidate meme](#) without doing much to kill it. As always, Your Mileage May Vary! In general, the more people who have your back online, the better.

## Danger Danger!

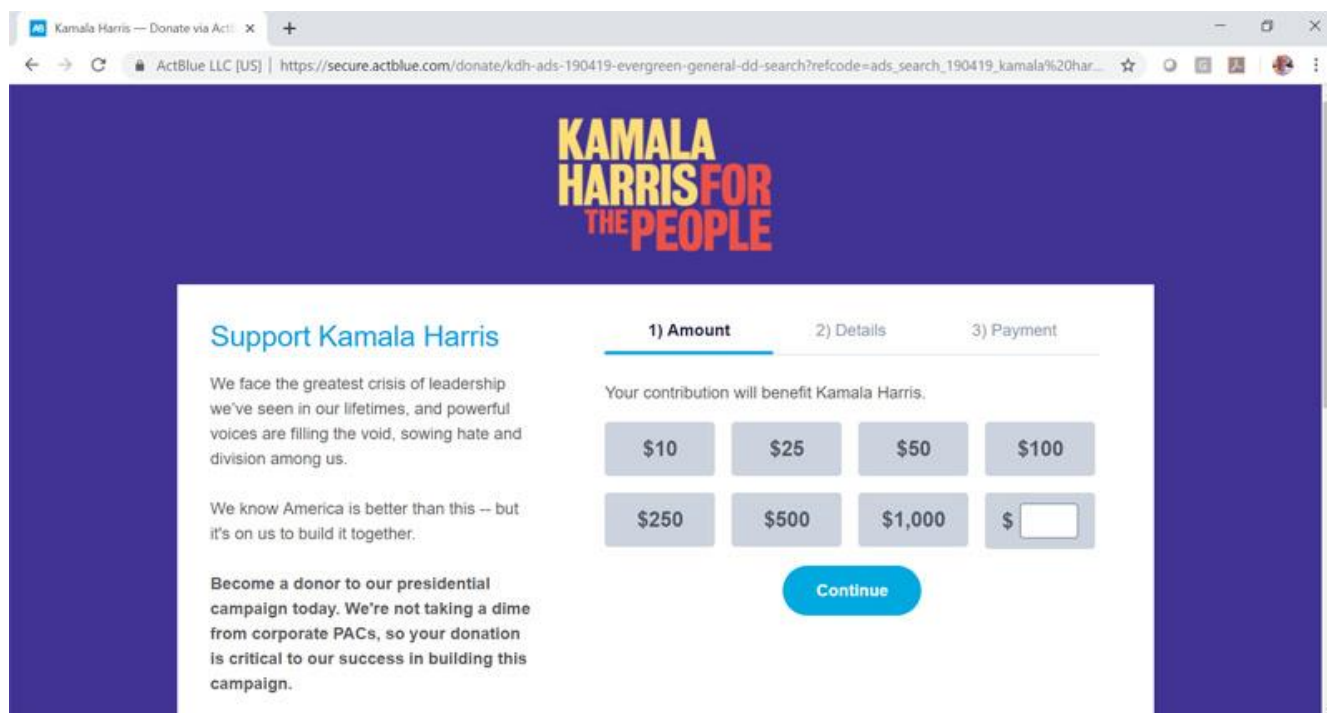
Of course, once you've fired up your supporters, you'd better live up to all that energy. Back in 2012, after Obama put in a lackluster performance in his first debate with Mitt Romney, Jon Stewart (among

others) skewered him for not matching "[the urgency and passion of \[his\] fundraising emails](#)" (ouch). **If you're going to raise expectations, be prepared to follow through on your end of the deal.**

## 14. Online Fundraising

What Dean and Kerry first suggested in 2004, Barack Obama had proved twice by 2012: an army of motivated online donors can be a truly decisive force in politics. With software designed to allow campaigns to tap the wallets of supporters within their districts and around the country now widely available, elections since then have seen a flood of online fundraising at the state and local levels. Of course, Democrats managed to find the limits of political money in 2020, with grassroots donors giving tens of millions of dollars to campaigns that failed on Election Day. [Money can buy ads, but it can't buy love...dependably.](#)

Limits aside, a campaign benefits immensely if most individual donations, even the big ones, come in online rather than as paper checks. Money collected via credit cards is available instantly, allowing a candidate to take immediate advantage of an overnight surge of income. Digital donation details automatically end up in a database, simplifying accounting and reporting. Physical checks present a logistical burden by contrast, since each has to be processed individually, whether it's collected at a fundraising dinner or arrives in the mail. According to legend, Gary Hart couldn't fully exploit his 1984 New Hampshire primary victory because the checks inspired by his win took too long to come in!



**Kamala Harris fundraising landing page in the middle of 2019. I arrived on the page via a Harris campaign Google search ad. Note the simplicity.**

As the Obama, Trump and Biden campaigns found, online fundraising also lets you 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. 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.



## Give now to Kirsten Gillibrand for President!


With the strongest anti-Trump record of anyone in the Senate, Kirsten Gillibrand is the fighter we need. Our movement is fueled entirely by the people we're fighting for, not corporate PACs or federal lobbyists, and we won't have an individual Super PAC. Donate now to join this team and help us bring true reform and restore power to the people.

1) Amount
2) Details
3) Payment

Your contribution will benefit Kirsten Gillibrand.

\$1	\$10	\$25	\$100
\$250	\$1,000	\$2,800	\$ <input style="width: 30px;" type="text"/>

Continue



**Fundraising page for Kirstin Gillibrand in 2019.**

Unlike high-dollar donors who often reach their quota for a 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. And of course, once someone's made a donation, they're (literally) invested in your victory. Only a percentage of the people on your email list will ever donate, though, so you'll need to grow your list as fast (and as large) as you can.

At the presidential level, in 2016 we saw several campaigns build robust small-donor lists well before the Iowa caucuses. [Ben Carson and Ted Cruz](#) on the Republican side joined [Bernie Sanders](#) on the Left in cultivating a base of potential repeat donors, which gave these candidates a chance weather early setbacks. Naturally, though, these campaigns would only benefit IF their supporters stayed motivated — too much failure could turn off the monetary spigot overnight. Trump's campaign waited until the summer of 2016 to roll out a comprehensive small-donor recruitment plan, but their Facebook-driven strategy worked: millions of conservatives joined his list, which was [still paying off for the Republican party](#) years later.

By the 2020 cycle, the presidential campaigns were [touting their small-donor prowess as a harbinger of greater success](#). For Democrats, the DNC's small-donor requirements for primary debate appearances offered a harsh reality check: [candidates who couldn't raise money from enough donors didn't make it on TV](#). Several previously promising campaigns ended early, while personally wealthy candidates like Mike Bloomberg and Tom Steyer stayed in the race longer. [Grassroots vs. the billionaires, indeed.](#)



A "splash screen" that intercepted visitors to Rand Paul's site during the Patriot Act fight in 2015. Immediate goal: [list-building, plus donations via the petition's "thank you" page.](#) Long-term goal: \$\$\$

## The Basics

So, how does online fundraising work? Giving to a candidate is much 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. Obviously, the easier this transaction is for users, the more likely they are to complete it. **Pro Tip: don't hide the "Donate" button on your website.**

Depending on the details of the campaign's CRM/mass email system and the extent of its integration with the fundraising system, 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 — something that would definitely suck.

Obviously, the closer the two systems work together, the more easily a campaign can track top donors. Testing is key — successful fundraisers test which messages perform well over time, separating out when possible how they resonate with particular demographic segments or interest groups. Test, rinse, repeat — a digital fundraiser's mantra.

As we discussed earlier in this book in the campaign infrastructure sections, a campaign may use a donation platform integrated with their website or their mass-email system. That situation is rapidly changing, however. Nowadays, Democratic campaigns are more likely to link to an ActBlue page, while many Republicans have migrated to WinRed. For more about why, head back a few chapters.

## Successful Email Fundraising Campaigns

We'll cover fundraising via social media and text messaging below, but at least as of 2023, if a campaign's asking for money, they're likely asking via email. As we covered earlier, email remains the most effective way to stay in consistent online contact with many people at once, at least in the U.S., and for years it's [the best online fundraising channel we have](#). Your list may START with people signed up via social media or at rallies, but email's still the tool to start them giving and keep them giving.

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 any more than necessary.
- 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 matters.
- Make the ask clear and the action links easy to find.
- Whenever possible, appeal to the emotions of your potential donors. Charities that focus on animals and children raise a lot of money online for a reason! Hope, fear, anger — all are fair game, depending on the context.
- 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/mass email system 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, 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 before, 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 mistake.
- 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 (as in [this message from advocacy organization UltraViolet](#)) 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 media 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. Experiments conducted in the 2014 cycle seemed to validate this combined-arms approach, with [Facebook advertising seeming to boost email performance for two Senate campaigns](#).
- 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.



Eric Cantor's eyes, the highlight of [a 2014 Democratic fundraising email](#)

## 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: one could be very open to tell-a-friend or volunteer requests but not so good at giving money, while another might respond in exactly the opposite way. Each mass email you staff sends 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 — presidential-level campaigns and the party committees employ these "A/B tests" routinely to pick the best subject lines before sending to a full list (for details, see the chapter on Data and Analytics).

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!

Message volume has become a Big Issue in the digital organizing field, with the Democratic party committees in particular sending [an unprecedented volume of fundraising emails since at least 2014](#). Some practitioners [pushed back](#), but others were unrepentant: they said that their own data justified the high volume of outreach, as did the massive amount of money they raised. By now, though, Democratic grassroots donors seem to have adjusted to receiving as many as several messages a day from presidential campaigns, party committees and activist organizations focused on winning the year. Individual campaigns and advocacy organizations should follow their example at their own risk, however, since they'll almost certainly have a harder time replacing lost donors than the Democratic Congressional Campaign Committee.

Of course, you could try [Jeb! Bush's December, 2015 approach](#) and offer to NOT send your supporters emails...if they give you \$25. A relief for the recipients? Probably. A move that screams confidence? Not so much.

## Artificial Intelligence and Political Email

As we've seen earlier in this book, campaign staff and activists [are turning to AI-driven tools such as chatbots](#) to create content for social media and grassroots outreach. For example, the Democratic National Committee let us know in March of 2023 that it's been including AI-generated fundraising email variants in its testing program, often to good results. And by letting the world know, the DNC has effectively given every Democratic campaign in America permission to try it.

Getting the most out of AI may require you to "train" a chatbot, perhaps feeding it rules of thumb or a set of successful past email fundraising appeals, but even simple queries may be enough to generate useful first drafts. Of course, always check the output! The DNC was careful to note that political staff

review (and surely edit) each potential fundraising email, in part because AI can sometimes [make things up](#). See the Big Trends chapter for more.

## Mobile Fundraising

Mobile phones are changing the fundraising equation, but not in the way you might expect. Yes, campaigns do have [options for straight-from-the-phone mobile giving](#), but these are likely to remain niche applications for most of us, except for the practice of taking donations via Square and similar technologies at events. High-profile campaigns may raise a few bucks from their SMS text lists or through peer-to-peer texting, but their success isn't likely to filter too far down the ballot.

The main effect mobile phones are having is on email: depending on the particulars of your list, more than half of your email recipients may open your messages on a cell phone. The problem? First, unless your email template is optimized for mobile, your messages may be hard to act on. The buttons may be too small to click, the text too hard to read, and people might have to scroll side-to-side to see the full message — a recipe for clicking "delete".

Second, donating via phone just isn't as easy as using a laptop or desktop computer. For one thing, credit card numbers can be a pain to enter into an online form. Plus, when people read their email via phone, they're often doing so while on the move or while looking up from something else. They're not sitting at a desk, typing away, and few will be excited to stop what they're doing and peck at a small screen to enter donation data.

To answer the mobile email challenge, **many technology providers offer "one-click" donation programs**. These store donors' credit card numbers and personal information for later use. With a one-click system, your donors can tap on the "give now" link in your email and send you money without breaking stride. Understandably, response rates for one-click systems tend to be higher, but you also have to persuade your donors to allow the system to store their info in the first place.

As their use spreads, one-click systems have turned out to confer an ecosystem benefit for the big Democratic and Republican donation platforms. Once a donor has entered information in ActBlue or WinRed for one campaign, it's generally stored for others.

Whichever system you use, be sure to highlight one-click during your donation process to encourage people to opt-in the first time they give. And, see if you can get them to sign up to give you a monthly "recurring donation".

And of course, as we covered way back in the infrastructure section, **make sure that your email templates are mobile-friendly**. Most campaign/nonprofit CRM/mass email systems offer pre-built email templates, so choose one that works well on mobile. Note: in a mobile world, simplified layouts can be a virtue — too much visual clutter can make messages hard to read.

Finally, while most campaigns have used the peer-to-peer texting and relational organizing tools we discussed in the Field Organizing chapter to reach voters directly or to manage volunteer teams, some candidates employ them personally to communicate with donors. With a few taps on a phone app, a campaign or candidate can push messages out to many donors at once, starting conversations that can continue one-on-one. Donors feel connected and in-the-loop, making them more likely to respond to the next appeal.

## Social Media Fundraising

Though email has proven in practice to be the most effective tool to raise money consistently, online fundraisers shouldn't ignore social media. It's easy to post appeals to the campaign's social channels at the same time that they go out over email, and even if the amounts raised aren't likely to be high, a dollar is a dollar regardless of where it comes from. Don't be afraid to experiment! Your own list may be more responsive to social appeals than you expect, and you'll never know until you try. Look for moments when supporters are particularly excited (or particularly angry at your opponent) and give them something to do about it — like give you money.

As we discussed in the Facebook chapter, some fundraisers had seen good results building lists and raising money by creating a Facebook custom audience of past donors and using it as a base for lookalike-targeted ads. As new people gave money, they would naturally become part of the lookalike pool and help refine the audience to whom Facebook served the ads. But with Apple's iOS privacy updates and Facebook's own rule changes, this approach wasn't yielding the kind of results in 2022 that a fundraiser might have seen a year or two before. Campaigns can and often should try this approach, but with expectations tempered.

Many charities and advocacy organizations now try to gin up donations via Facebook's native fundraising tools for nonprofits. Though groups CAN raise a few bucks by posting appeals to their own Facebook pages, most seem to get better results by asking supporters to create fundraising campaigns on their behalf. Asking supporters to "donate their birthday" to the organization has become a common way for groups to try to tap their fans' social connections for cash.

Most campaigns are likely to find that Facebook, Twitter and Instagram are more useful as engagement channels, however, keeping loyal supporters fired up and therefore primed to respond when an email, text or direct mail appeal arrives.



Brad Parscale, the man behind Trump's 2016 automated Facebook outreach campaign

## Viral Fundraising

Finally, let's consider the personal donation campaigns that individual volunteers launch on their own, perhaps through a campaign's online toolkit. This technique was one significant way that Obama's winning presidential campaigns put supporters to work, alongside [much other online outreach](#). Nowadays, individual activists can also link to a campaign's ActBlue or WinRed pages.

Supporter-driven distributed financial outreach raised a few tens of millions of dollars directly for Obama's two campaigns, but perhaps more importantly, it helped mine individual fundraisers' social connections for new donors. Who would then of course find themselves on the main campaign 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 CRM/grassroots technologies. See if you can fire your people up and get them raising money on your behalf — once they've bought in, they're invested.

Since the 2016 elections, the Trump Resistance has highlighted a different [viral angle](#) to online fundraising: individual progressive candidates raised millions by tapping into the passion of Trump opponents. [The Daily Kos community helped elevate Jon Ossoff's](#) (ultimately unsuccessful) 2017 House campaign, and Alexandria Ocasio Cortez toppled a top House Democrat with [support from progressives across the country](#). Even a Texas House candidate [raised hundreds of thousands from a viral video!](#) **All politics is local, but we're rapidly reaching the point where [local fundraising \(can be\) national](#).** If your local campaign can hit a national nerve, you may find yourself flooded with the kind of financial support that was limited to statewide candidates only a few years ago.





## 15. Data and Analytics

---

"Political data" became a magic phrase over the past decade and a half, starting with [the Obama campaign's emphasis on using data](#) to target and test its communications with supporters, donors and potential voters. By the 2016 cycle, political data was an established part of the campaign world, to the extent that it barged its way onto a presidential debate stage. When Bernie Sanders publicly apologized to Hillary Clinton and to his own supporters on national TV for [his team's sneaking a peek at some of her priority voter contact information](#), you knew data had arrived: it was [at the heart of a scandal](#). Days later, a national voter file [made its way onto the web under mysterious circumstances](#), prompting even more scrutiny of political data vendors. Good times!

After that, the data story became downright sordid, with analytics firm Cambridge Analytica blowing up over revelations that it [scraped friends-of-friends data from Facebook](#) and used it for voter targeting — among [other crimes against decency](#) the company may have committed. Meanwhile, [Russian hackers stole Democratic emails](#) and shared them with the public at pivotal moments in the campaign. On the legit side of the scale, the Trump campaign [integrated social-media data into its outreach](#) on a scale we hadn't seen in politics before.

**Clearly, campaigns must recognize how important data security has become!** Unless you want your internal messages — or worse — exposed to the world, [start taking basic protective steps](#) and ask your tech vendors about cybersecurity options. YOU HAVE BEEN WARNED. Also on the security front, note that anyone posting ads that Facebook deems "political" will have to be authorized to do so, as we discussed a few chapters ago.

Though the word "data" may scare off the math-averse, even a one-person campaign can use basic data analysis to get more bang for every buck it spends on voter outreach. Let's start with the basic building block of American political data, the voter file.

### The Voter File

Though we speak of "the voter file" as if it were a single thing, we're really talking about different collections of voter data depending on where we are. Outside the U.S., many countries don't allow political campaigns to access official lists of registered voters at all, but that data is considered public in the States.

We're usually referring to databases derived from voter lists maintained by individual counties under rules set by each state across the country. Data vendors and political parties collect them and aggregate them into local, state and national files. On the Democratic side, the process has gone something like this in recent years:

- State parties gather data from their state's county voter registrars
- They pass the information to the national Democratic party organization
- The party contracts with data vendors to "clean up" the data, bringing it into a common format, removing duplicates and looking for bad records or obvious errors

- The data vendor "appends" consumer data (from cellphone numbers to demographic information) to the file.
- The national party passes the data file back to the individual state parties, which have their own processes for allowing candidates to access the file. Some states make campaigns jump through more hoops (or pay more money) than others.
- Candidates put the data to work via grassroots organizing tools like the Voter Activation Network (VAN).

The process on the Right is likely similar, though I'm not as familiar with the details. Many campaigns and outside organizations (like labor unions, political action committees or independent expenditure groups) either can't access the state parties' voter files or choose to look elsewhere, though. Vendors in the U.S. now offer voter files with varying levels of detail and more or less data appended to the basic voter list, including established companies like TargetSmart, Catalist, L2 and Aristotle.

As we discussed in the chapters on Facebook and on digital advertising, campaigns and political organizations frequently export voter data and upload it for ad-targeting purposes. In [my own work in recent years](#), I often manipulated spreadsheets with as many as 900,000 individual voter records, editing them to fit the formats required by Facebook and by a programmatic ad vendor.

## Website Analytics

Much of a campaign's useful data actually resides in-house and doesn't have to be purchased or rented. For instance, website analytics show how people are finding your campaign website and what they're doing when they get there. Most website hosting arrangements have some kind of usage statistics package, but most of us use Google Analytics, too — you just need to create an Analytics account and then add a snippet of code to your page template (or have a techie friend do it). From there, you can use the Analytics dashboard to answer several important questions:

- What pages are people accessing on your site?
- Where are they coming from? (i.e., what "referring sites" are sending you traffic?)
- Are speedbumps slowing people down at any point on the site? For instance, comparing page-view data and your email list/CRM data can show you if a significant number of people are accessing the "donate" or "volunteer" pages but not actually giving money or signing up. In that case, you'd want to take a close look at those pages and try to figure out what's stopping people.
- What's the overall traffic trend over time? What does it tell you about the attention your campaign is generating?
- What campaign news and events generate bursts of traffic to the site? And, is the site doing a good job of converting those new visitors into supporters, donors and volunteers? Quick measure — compare "new visitors" numbers with your email signups over the same time period to find (roughly) the percentage of visitors who sign up for your email list. More

sophisticated campaigns will integrate tracking "pixels" provided by Google Analytics, Facebook, LinkedIn and other vendors into their page templates to measure conversions.

Campaigns with more time and resources can use website analytics to answer more complex questions — for instance, tracking users' typical paths through the site — but for most local races, these basics will usually be enough. The nice thing? Google Analytics reports take just a few minutes to skim through once you're used to them. Campaign staff should check them often.

## Email Analytics

Email marketers care *a lot* about data — the right subject line on an email appeal may double its yield. As we discussed earlier, any mass email/CRM system worth a damn will let you track basic information about your messages, including the percentage of messages opened by recipients ("open rate"), the percentage that click on the action in the message ("click rate"), the percentage that follow through with a donation ("action rate"), and the percentage who drop off your list with each message ("unsubscribe rate").

Your goal is typically to maximize your open, click and action rates and minimize your unsubscribe rate (a few people will almost always unsubscribe when you send a message, which is one reason you need to constantly add more supporters to your list). Track your messages over time to find out: which subject lines did supporters click on? What appeal language generated the most individual donations? What appeal language generated the largest AMOUNT of money in total? Similarly, which appeals generated the most volunteer signups?

Every email list is different, and tracking statistics will help you find out how your particular universe of supporters behaves — and what tactics you can use to persuade them to help your campaign in the moment. The humble spreadsheet can be a powerful tool in this fight, since creating a chart that shows email subject lines, send dates, open rates, action rates, donation amounts and unsubscribe rates lets you evaluate trends at a glance.

Note that as of 2023, privacy changes have introduced a new level of fuzziness to email open rates, since they make it more difficult for mass-emailers to know who's opened a given message. In practice, we still look at them for directional value, understanding that they're not as exact as they may have been in years past.

## List Segmentation

Sometimes you don't want to send a message or target an ad at EVERYONE on your list. Instead, you'll segment your list based on some set of characteristics. This often involves members' past behavior such as donation history but can also focus on where they live or other demographic information. Some simple examples:

**1. Segmenting based on past giving history.** For instance, campaigns often target non-donors with a small-dollar ask (\$3 or \$5) to get them moving up the ladder of engagement. Once someone's donated, campaigns will often tailor future asks based on donation amounts. For instance, \$5 donors might receive a message asking for \$10, while you might ask those who last gave \$50 to donate \$75

this time around. Really sophisticated campaigns will hit each donor with a custom ask exactly tailored to their past giving, but most of us will break donors down into bands — i.e., people who gave under \$10 in the past receive a \$10 ask, those in the \$10-\$20 range receive a \$25 ask, etc.

**2. Segmenting based on other past behavior.** If you've sent out issue-based messages in the past, for example, you might segment your list based on which messages people opened and target them accordingly (within the limits described above). This way, you hit people who opened an education-related message with a fundraising ask that focuses on the candidate's education agenda. In theory, they'll give more. In practice, the data will tell you whether they do or not.

**3. Geographic segmentation,** which is particularly useful when you're trying to get people to come to a local event or when you're trying to recruit volunteers in a particular town or neighborhood.

**4. Random segmentation for A/B testing.** Once your list reaches a good size (at least a few thousand members), you can start the (admittedly time-consuming) process of A/B testing various aspects of your individual email messages.

## AI and Political Data

In addition to creating content as we've discussed already, [AI chatbots and other machine-learning platforms can also help campaign staff manipulate data](#). An AI may be able to spot subtle patterns in ad performance data or help us identify voters in specific demographic groups more precisely, for example. Chatbots can also perform more prosaic tasks like helping to create or manipulate spreadsheets in bulk. Be sure to validate the results, of course — an AI may not be quite as tethered to reality as one might like. See the Big Trends chapter for more.

## A/B Testing

How does A/B testing work? First, you identify the variables you want to test, typically things like email subject lines, appeal language, photos/images, etc. Then, you create two (or more) separate messages that incorporate the differences, send them out, and measure the responses. You'll usually find out right quickly which one performs better.

You might send your A/B variants to your full list rather than an initial test segment, hoping to learn more about what tactics will work on future messages. But if your list is big enough, you can send those test messages to a small subset of your main list, using the results to decide which subject lines, images, etc, go in the final message you send to everyone. I.e., if your list includes 100,000 people, send one variant to a random sample of 5000 and the second variant to another random sample of 5000. When you know which one does better, send it to the remaining 90,000 email addresses.

[The Obama 2012 campaign used the latter tactic extensively](#): at times, they tried dozens of message variants on test recipient universes, often finding that the subject lines they THOUGHT would do well, didn't. At times, testing allowed them to double the amount of donations that a given message generated, simply by finding the variant that people responded to most vigorously in tests (their most successful single subject line: "Hey"). Across the life of the campaign, testing yielded TENS OF MILLIONS OF DOLLARS in extra donations.

In 2023, most large-scale political fundraisers now A/B test their appeals as a matter of course, and as political CRM providers update their wares, more and more have incorporated easy A/B testing and variant-selection into their systems' architectures. Ask about it when you're evaluating email/CRM technology.

For more about conducting A/B tests, see this [guide for political campaigns and nonprofits](#), plus [5 Testing Mistakes Everyone Makes Once \(and How to Not Make Them Again\)](#).

## A/B Testing Web Pages

A/B testing isn't just for emails and ads, BTW — you can also test your landing pages and other web (or mobile) properties. [A tool called Optimizely](#), for example, allows you to test different variants of a page and see which one generates the most conversions.

## Social Media Data

At a basic level, campaigns should note how many people are following their Twitter feeds and Facebook pages, but these two numbers won't tell you much in isolation (in fact, they're frequently [referred-to as "vanity metrics,"](#) — people try to drive them higher 'cause it looks good).

Here are a few analytics that DO matter on social media, which are fortunately usually relatively easy to track:

- Who's following you? (Follow up questions: Do you recognize them? Are they in your district or in the communities you're trying to organize? Are they "influencers" you're trying to reach?)
- Is your following increasing, decreasing, or holding steady? What's the trend over time?
- Are people interacting with your content? On Facebook, are they Liking/Commenting/Sharing? On Twitter, are they retweeting your info or replying to it?
- Which of your posts are generating activity on Facebook or Twitter? Certain issues? Particular kinds of content, for instance photos/images vs. links to articles?

Facebook gives Page owners access to an analytics tool it calls "Insights," which (like everything else on Facebook) changes constantly. To learn how to use Insights effectively, search Google for a guide to Facebook Insights. Be sure to check the date! Insights may have changed significantly since an article was published, even if it's only a few months old — Facebook has been cutting back on the information it provides in recent years.

To track the performance of your Facebook content, you can always create a spreadsheet of your Facebook posts, just as with your fundraising and other emails. In the case of Facebook, you'd list the post title (or some other information that'll help you identify it), the date posted, how many people "saw" the post and the individual numbers of Likes/Shares/Comments each post generated. Or you can let Insights do it for you — depending on when you read this, it may export this kind of data for many posts at once.

Likewise, a spreadsheet is your friend on Twitter — again, you'd list your tweets and when they were posted (include a URL for the Tweet for later reference), along with how often they were retweeted. If possible, you might also list WHO retweeted them, a measure of whom you're influencing on Twitter.

But keep in mind that social media analytics are just means to an end: understanding your audience and the content that engages them.

## Facebook Custom Audiences

[Facebook Custom Audiences](#) provide another way to tie data to Facebook outreach, since they let you upload an email list or a voter-file export to use to target Facebook ads. Check out the Facebook chapter for more details.

## Social Voter-to-Voter Tools

Back in 2012, the Obama campaign tapped some of its Facebook supporters' social connections by comparing their "friend" lists with a voter file, with the goal of connecting many voters it couldn't reach through other channels. **Alas for campaigns, [Facebook disabled this kind of grassroots tool years ago](#)**. But as we discussed earlier, some campaigns were still using data "scraped" from Facebook profiles without users' approval (see: [Cambridge Analytica](#)), a practice Facebook claims to be cracking down on.

To some extent, relational organizing tools have filled the friend-to-friend void. See the chapter on Field Organizing for more.

## Message Testing

Campaigns traditionally test their basic messaging using polls, focus groups and their own judgment. Online data, however, now give staff new tools to evaluate the themes, issues, framing and wording they use to define their candidate.

Website and email analytics can help, since page traffic can give a sense of the subjects voters are interested in, while email response rates show which appeals work with a campaign's existing supporters. Online ad campaigns can tell you much more, even for a local campaign using Facebook and Google Ads. As we discussed earlier, testing multiple ad variants helps focus resources on the versions that turn out to work, increasing the effective value of every ad dollar spent. Ad-driven message-testing extends this approach to gathering data about overall communications themes.

A common technique: run separate ads with different messaging options vs. various keyword combinations on Google, to identify the themes that resonate with people searching for information related to those particular keywords. Similarly, campaigns can run ads against different demographics and interests on Facebook/Instagram, gathering data about which messages and imagery each separate target audience responds to. The best part: you gather useful information AND new supporters with the same clicks.

## TV Targeting and Multi-Screening

Data can also help target and optimize TV ad buys. As [described in more detail in this \*Campaigns & Elections\* article](#), campaigns can work with cable companies and other providers of ad inventory to identify the most cost-effective times and channels to reach vital voters. In the process, they can often cut their cost-per-voter-contact significantly. Many large-scale campaigns now use this "audience-targeting" approach, frequently combining digital channels and TV to reach voters on whatever screens they're watching.

## Voter Modeling and Targeting

As the data options available to campaigns improve, more and more employ predictive models to decide which individual voters to prioritize for contact. The Obama 2012 campaign used this technique to an unprecedented extent, assigning every voter in priority areas a numerical score from 1 to 100 based on 1) their likelihood to vote for the president, and 2) their likelihood to turn out to vote.

Campaign staff based these scores on a combination of factors, including voter-file information on past election turnout, cross-referenced with census information and data about past consumer choices obtained from commercial providers. Plus, the campaign reached out directly to voters themselves, collecting information from phone calls and canvassing visits.

Their main goal? Reaching voters with a high likelihood of voting for Obama but a spotty record of going to the polls, since those people promised the highest return on the campaign's investment of resources. While [their data work was far from perfect](#), a clear sign of their success was the [high turnout of key demographic groups](#) in battleground states.

The rest of us won't have a presidential campaign's cadre of analysts and data scientists to run numbers and create voter models, but most campaigns can get access to at least a voter file. From there, it's a question of identifying the voters most important to win over in your district and targeting them with online ads, direct mail, phone calls and canvassing. Many vendors would be happy to help you with this process...for a fee.

As we've discussed before, campaign outreach work provides even MORE data, in the form of ad response rates and answers to canvassing questions. A key strength of good data-management systems? The extent to which they make it relatively easy for you [to feed new data into the system and act on it quickly](#).

**Never forget, though: data can provide targeting coordinates, but it does you no good until you put it to work. Don't invest seriously in data analysis unless you also have the resources to take advantage of it.**



Image: ©iStock/redmal



## 16. Logistics, Budget and Staffing

---

"Amateurs talk strategy, professionals talk logistics" — it's an old military adage, but it applies to the world of digital politics as well. The tools are only as good as the human systems that put them to work.

As we've seen, a modern online campaign gets intricate fast. At the very least, most campaigns will need to create a website, administer a supporter list via CRM, create a Facebook Page/Instagram account and a Twitter account, run digital ads, post videos to YouTube and Facebook/Instagram, connect with online activists, and manage the infrastructure to raise money online.

Those are just the tools — to put them to work, the campaign will need an email strategy, a recruitment strategy, a social media strategy, a grassroots strategy, an advertising strategy, a fundraising strategy, a cybersecurity strategy and last but not least, a turnout operation to actually get people to the polls. And that's pretty much the minimum, at least for a Congressional or statewide race. Whew!

### Staff vs. Consultants

So who should do the work, campaign staff or consultants? I don't know too many experienced digital campaigners who would argue that a campaign should outsource its **entire** online operation if it has a choice — unless the people saying that are consultants themselves. Digital tools have become such a central part of how we communicate with each other that [it's pretty much essential to have the online staff fully integrated into a campaign](#). For an example of how strongly digital professionals can feel about this question, look at [the pushback Joe Biden's campaign received](#) when it explored the idea of outsourcing its digital team to a Mike Bloomberg startup for the general election in 2020.

Remote consultants will rarely have the same feel for local conditions as a person embedded in the campaign. Someone working out of an office in Washington, DC isn't interacting day to day with actual people who'll cast real ballots in your district, and he or she isn't seeing the candidate up close. This factor matters particularly for social media, since people can smell insincerity a mile away on Facebook — whenever possible, keep the day-to-day content-posting close to home. [For a very different take on the role of consultants, BTW, see [this 2015 article by Josh Koster](#).]

In fact, talented friends of mine in the field argue that [a campaign's FIRST hire should be a digital director](#), supplemented as needed by a big-donor fundraiser — because what the digital team does is effectively the backbone for the rest of the campaign. Of course, if you're small campaign, your digital team, strategy team, field team and media team may all be the same person!

It often DOES make sense to outsource tasks that require particular technical skills or specialized knowledge. Digital advertising is a good example, since even Google and Facebook ad campaigns benefit from extensive experimentation with keywords and demographics, something that's difficult to do well if you're learning on the fly. Campaign websites are another area that consultants usually handle, though perhaps less so as more campaigns use integrated systems that provide both mass email and a pre-built basic site.

I've also heard good arguments for the idea that campaigns should hire consultants to help with the campaign's core online strategies, from social media to fundraising, even if their own staff may be operating these channels day to day. For one thing, consultants are typically working with many different clients, giving them a broader perspective. They can apply lessons from each one to all the others. Also, a consulting shop will usually have staff specializing in different aspects of online campaigning — a video expert, email fundraising experts, etc.

But campaigns shouldn't treat even the best consultants as "black boxes": don't just pour in cash and hope for results. Instead, work closely with your outside experts to get the most out of every dollar you spend.

## Where Does a Digital Team Fit?

Where should the digital staff "live" inside a campaign? If you could ask the Obama operation, the first truly successful internet political machine, they'd say that [the online team should be at the leadership table](#) and equal with field, fundraising, communications, IT, etc — it should be an entity of its own, not stuck under the tech director and hidden in a basement somewhere. At the same time, digital staff should also be integrated with the rest of the campaign, working closely with their peers on other teams.

For an example of why, I once heard an online advertising consultant for a top-level 2008 Republican presidential campaign talk about how he could see trends in the political environment days in advance by looking at how different Google ad variants performed. But because he was functionally off in a silo and not interacting regularly with the rest of the staff, they could rarely take advantage of the trends he saw.

Trump 2016 took digital integration even farther than Obama: campaign digital director Brad Parscale functionally ran Trump's entire outreach strategy in the last couple of months of the race, including TV advertising. Not surprisingly, Trump put a bigger percentage of his budget into digital than any top-level campaign we've seen to date.

By 2020, at least some Democratic campaigns and organizations were following Trump's lead. SuperPAC Priorities USA [placed a digital staffer in charge of ALL paid media](#), including television, and presidential campaigns were similarly [elevating digital and data experts to high positions](#). One advantage of drawing from the digital pool? [A more diverse universe of talent](#) to tap: internet- and field-focused teams tend to look more like America (at least on the Left) than the largely white and male universe of media buyers and pollsters. Meanwhile, Biden's victorious general-election campaign was led by [an experienced field organizer!](#)

Of course we're talking about campaigns of a certain size — someone running for mayor in a small town may not have staff at all, just family and volunteers. But serious Congressional candidates and many people running at the state and local level should do their best to hire dedicated digital talent if they're going to take full advantage of the opportunities the internet offers.

Regardless of who does the actual work, it doesn't make sense for a modern campaign to launch without a basic digital foundation in place, starting with a website, CRM, Facebook page and search advertising. Why announce without a way to leverage that initial burst of attention? Why hold even

the very first events without a way to sign people up and keep track of them? Why let voters, bloggers, journalists and activists hear your candidate's name without a way to find him or her online? A missed connection equals a missed donation — or a missed vote.

## Technology Vendors

A dozen years ago, as we discussed in the infrastructure chapters, 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 CRM systems 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 an email system like [MailChimp](#) with a website built by their media consultants or a local firm. But candidates can also choose from an array of tailored professional offerings, since most online consulting firms offer their clients websites, CRMs and similar technologies as a package. For more, see the chapters on campaign infrastructure, which go into detail about choosing vendors.

A word to the wise: it very rarely makes sense to have custom technology developed to perform standard tasks, unless your name is Barack Obama. Newt Gingrich's [\\$800,000 website/CRM combo from 2012?](#) He could have bought the same capabilities off the shelf for next to nothing, and likely paid a few thousand dollars for configuration and customization. So much for running on a message of fiscal prudence....

**Be sure to talk with your digital consultants about cybersecurity!** With ["phishing" attacks against candidates commonplace](#), no campaign can take the prospect of being [hacked or attacked](#) lightly. If your consultant doesn't treat the prospect seriously, find one who will.

## Online Budgets

A big question: how much SHOULD campaigns spend online? In past cycles, most campaigns spent relatively little, perhaps a percent or two of their overall budget. Even the Obama campaign's 2008 online spending was a tiny fraction of what he invested in TV ads. This situation is finally changing — by 2010, many campaigns were starting to allocate 10% of their total spending to online channels, particularly advertising. In 2016, a comparable number was 15-25%, again with the biggest chunk going to pay for ads. [Republicans VASTLY outspent their opponents](#) when it came to digital advertising that year, though the tables have evened in the years since.

Still, even the most digital candidates ([Trump excepted](#)) lag behind corporate marketers! Many commercial brands now put 30-50% of the promotional budgets into social media, digital advertising and other online channels. When will campaigns catch up?

In your case, hard numbers will vary depending on the specifics of your race. TV ads are still usually the best way to reach uncommitted voters (though not always — what if you're running in a small district buried in a big media market?), but the internet builds connections that can be tapped again and again, making the two 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 online advertising](#) to be surprisingly high.

Rather than thinking of "online" as its own separate world, campaigns should [integrate digital more broadly into their operations](#). For instance, traditional media relations and influencer relations require most of the same skills and employ many of the same tactics, so the press folks could include bloggers and Twitterers and Instagrammers and TikTokers 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](#). Likewise, field organizers can embrace Facebook, Twitter and text messages.

As media habits change, political marketers should think less about spending on particular channels and more about the voters they're trying to reach. How do THEY consume media? In your area, what percentage have "cut the cord" and watch all their "television" online? How many are on cable or satellite and ignore traditional broadcast channels? How many voters are ACTUALLY watching the local evening news? The more you understand how your particular slice of the electorate consumes information, the better you'll be able to allocate your advertising and other dollars between TV and digital channels.

In some ways, more important than the resources devoted to online outreach is WHEN they're employed, since list-building [is incremental and rewards an early start](#). For instance, even if campaign has yet to pick a full-fledged CRM, it should still collect names and email addresses whenever possible. The candidate can always bring a laptop/iPad and a staffer or volunteer to real-world events!

## Time

For a small or even solo campaign, aggressive online activism may not 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, and even buying Google Ads can be relatively straightforward if you're not trying many keyword/content combos. Paid Facebook promotion usually just takes the push of a button (and a credit card — cha-ching!).

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. Of course, we're talking about the bare minimum — real engagement will take time.

If you're a small campaign with a single staffer, try to spend at least eight hours planning and executing your online-specific strategy per week, particularly at the beginning, remembering [that those early hours can be far more valuable than time spent right before the election](#).

In any case, keeping up with a campaign's digital 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. Still, in 2020 it was rare for even a

statewide campaign or a state party to have more than one or two dedicated digital staffers, though that situation may change in the years to come.

## AI as a Force-Multiplier

As we've discussed in other chapters, campaigns are [experimenting with AI for content production and data analysis](#) at a furious rate in 2023. With AI able to crank out tweets and fundraising emails with ease, platforms like ChatGPT can help staff get a lot more work done in their limited time. See the Big Trends chapter for more, and note that we're just at the beginning of AI as a tool in politics.

## Stay on Target

Regardless of their size, campaigns will constantly be buffeted by outside events. But even as you dodge the slings and arrows of outrageous fortune, take care to keep the steady process of building a supporter base on track, no matter how many day-to-day crises scream for attention.



Image: ©iStock/plherrera

## 17. Digital Trends to Watch in 2023 and Beyond

---

Finally, let's take a deeper look at some of the big trends affecting the digital playground for campaigns, advocates and activists this year.

With the release of chatbots like ChatGPT, [artificial intelligence became a realistic tool for campaigns and advocates](#) at the start of 2023. More chatbots and other AI platforms have since followed, accompanied by a great deal of hype. ChatGPT and its friends can seem almost magical when people first interact with them, but the current generation has limitations that should protect most of us from a robot job takeover...for now.

A chatbot ultimately reflects our own language back to us, based on the correlations its machine-learning algorithms find among the billions of words of human writing it's been fed. It's not going to come up with an idea because it understands something in a new way, but because it's put words together in a sequence that humans interpret as meaningful. But that's okay! If a chatbot comes up with language that helps campaign staff or consultants do their jobs better, it's a useful tool.

For instance, [chatbots might help field organizers to "cut turf,"](#) breaking down a voter file into lists of doors for volunteers to knock or phone numbers to call. Similarly, a data analyst could ask a bot to create a stack of spreadsheets from a big mass of advertising data, or look for patterns in polling crosstabs. Other communicators will use them to create ad variants or ideas for content, often after "training" the AI by exposing it to samples. Behind the scenes, AI tools may help us reach the right voters cost-effectively, since they'll be baked into platforms from social media to advertising to email deliverability.

Of course, some companies that take a standard tech product, sprinkle a little AI on it and turn on the marketing machine. Already, my inbox regularly features pitches from AI-driven content marketing companies, donor-lead generation platforms and the like, some of which may not be as legitimate as others. Buyer beware!

Another pitfall? Chatbots look at patterns in the ways humans use words, not at how those words relate to the world itself. [AI can lie!](#) Today's chatbots [routinely make up "facts"](#) when they're asked to create content, and one suspects they have little instinct for politics. AI can turn out content, but any campaigner who feeds those words or pictures unedited into the world is asking for trouble. And those words can be pretty terrible, since a basic request to "write me a fundraising email" without context or detail [can turn out some wretched results](#).

Similarly, an AI's analysis of your marketing data will functionally come out of a "black box" — you'll see the results, but you won't have any real idea about why the AI arrived at the conclusions it did. AI does not give us easy ways to check its work! So be sure to build in checkpoints that allow you to compare an AI's output with information you know is correct. You don't want to make decisions based on bad data any more than [a comms person wants to put out a press release apparently from an alternate universe](#).

Actually, bad actors may WANT to spread tales from alternate universes! AI can churn out disinformation as easily as it can create any other writing or imagery, and as we have seen repeatedly

in recent years, lies can spread extremely quickly online. AI neither knows nor cares how you'll use its work product, and it could turn out to be the most powerful digital trickery tool of all times.

Despite these downsides, campaigns and other political communicators will sure put AI to use for a bewildering array of tasks this year. Armed with the right queries, and after a little experimentation, campaigns and advocacy organizations can and will use AI tools to get more done in less time in 2023. Watch this space — AI will almost certainly evolve more rapidly than any other slice of campaign technology in the next few months.

## 2. Social Media and Society

[Our relationship with social media? Complicated.](#) The companies see themselves as a force for good: Facebook founder Mark Zuckerberg, for one, clearly feels that connecting people in new ways is [inherently positive](#). But as we've seen in this book, digital tools do not care who uses them. In practice, people have found it just as easy to use Zuckerberg's baby to [organize a riot](#) — or [a massacre](#) — as a happy hour.

Platforms built to value engagement over truth naturally favor the lurid and the extreme, and conspiracy theories and disinformation naturally thrive without some mechanism to filter content. How many people found QAnon and anti-vaccine videos because Facebook or YouTube recommended them? Millions, and [not just in the United States](#). The platforms WANT to be the center of our digital universes, but they haven't put in the time and money to tackle the responsibilities that accompany that status.

Russian social-media manipulation set off SOME alarms after 2016, though I doubt their work shifted many votes in the U.S. elections. The real enemy was us all along: anti-vaxxers, anti-maskers and Q are America's homegrown social-media horrors, and the Capitol riot was a natural outcome of a digital environment that locks us in our [personal information bubbles](#).

Lies spread fast with an assist from prominent voices, and I was not remotely surprised to find that [political misinformation plummeted on Twitter](#) when it [first banned Donald Trump](#). Rarely do lies require advertising to reach gullible ears, but tech companies' "solutions" have usually been limited to [placing hurdles](#) in the path of legitimate political advertisers or [banning paid political content](#) entirely. In the process, they've made it HARDER for campaigns and activists to respond to smears and falsehoods.

The answers? I don't have easy ones. For a start, perhaps Facebook and company could put the kind of energy into slowing down conspiracy-theory superspreaders that they do into policing copyright violations. I'm as much of a [free-speech purist](#) as you're likely to find, but we don't generally put up with incitement to violence when we encounter it in real life. Why should we allow companies to [profit from hate and fear](#) in the virtual space? Restrictions on the spread of "stop the steal" and Q-related content are not ideal, but these lies also killed people in the physical world. [They are far from alone](#).

### 3. Social Media: Campaigns, Advocates & Activists

With all that in mind, you might not be surprised that [political social media somewhat up in the air](#) in 2023. Besides incitement and active disinformation campaigns, digital activists have to deal with the lingering fallout from ongoing [data-breaches](#), [Russian election-hacking](#) and [Cambridge Analytics data-scraping](#), including [those disclosure and verification requirements](#). More fundamentally, political communicators face the same problem as every other Facebook page owner: [most of our followers will never see our content unless we pay for the privilege](#). In practice, campaigns and advocacy organizations will [rely on a mix of compelling content, active supporters and paid promotion](#) to get their messages in front of the right voters. Smart campaigns will also spot opportunities to take advantage of spontaneous social enthusiasm. Elizabeth Warren's campaign didn't create those [now-legendary selfie lines out of the blue](#) — they capitalized on a practice her passionate supporters started themselves.

Meanwhile, a few campaigns will be intrigued by the [Trump campaign's industrial-scale, data-driven Facebook outreach program](#), impossible to replicate now as it may be. Campaigns of all sizes still flock to Twitter, still taking advantage of [the platform's prominence in the age of Trump](#) to reach reporters, activists and the public at large. Similarly, social-media livestreaming was *de rigueur* for 2020 presidential campaigns and Capitol rioters alike, with activists of all kinds broadcasting political activity directly to the world for better or worse. What about SnapChat, TikTok, Instagram and Twitch? See the big-picture social media chapter for more, but look for campaigns and organizations to experiment with just about any digital tool you can think of, particularly when they can motivate supporters to be active on their behalf. Still, [Facebook and Twitter will dominate the average social outreach strategy](#).

### 4. The Public is (Still) Fired Up

Riots and conspiracies show the dark side of digital activism, but that's of course not the whole story. As the massive voter turnout in recent U.S. elections have shown, millions of people are fed up with the way things are and are fired up to change it. As I wrote [late in 2018](#),

Think of the Parkland students crossing the country to work for gun control, or the thousands of Indivisible chapters that have sprung up spontaneously in all fifty states, or the [Democratic women organizing in secret in deep Red America](#). The Right gets in on the action sometimes, as in that [border-wall crowdfunding campaign](#), but the real passion has been on the Democrats' side since Trump went to the White House. If I were running for president, one of my priorities would be to create a system to harness it.

Not just in the United States, either, since protesters have challenged political authority from Hong Kong to Sudan in the past few years. The trick for campaigns and activists is to [understand this enthusiasm and channel it toward positive ends](#). Crucially, this kind of people-powered politics treats supporters as an active part of the process and a major outreach channel in themselves. Voters are people with whom we have a conversation — they're not just passive receptacles for our advertising.

In 2016, Bernie Sanders's volunteers famously helped his campaign with [everything from technology to field organizing, donating millions along the way](#) and bringing him closer to the Democratic



nomination than almost anyone expected. Meanwhile, Trump supporters did their best to retweet the future president to the White House (with [a little help from Moscow](#)), and their grassroots donations basically [paid for](#) the last two months of his victorious campaign. After Trump's inauguration, [Left-leaning activists](#) in the "Resistance" [self-organized to a remarkable degree](#), bringing a new energy to progressive causes. Their chief rivals? The members of Trump's "base", whose passions he stoked through furious and fuming missives posted online. From racial justice to immigration policy to abortion, the conflict between their competing visions will power American politics for years to come.

## 5. Data-Driven Voter Targeting

Despite the intensity of this new wave of political activism, many voters are still hiding from political campaigns. Traditional American political advertising practices can't always handle a world in which voters abandon broadcast media in favor of Netflix, Hulu, Spotify and YouTube. The death of land lines and the ubiquity of cell phones complicate phone-banking, robocalling and polling. As far back as 2012, the Obama campaign could only find phone numbers for about half of the voters aged 18-30 on its target list, and many had moved so often that their physical addresses were dead as well. No matter how good your data model is, it won't help if you can't actually reach the people you need. Fortunately for those of us trying to influence and mobilize the public, digital options can fill the gap.

Campaigns can now employ a wide array of digital targeting techniques to contact defined groups of voters via "addressable" communications channels. Digital ads, for example, can be targeted via a voter file to reach specific households with messages designed just for them. Powerful, [assuming that your voter model is correct](#) in the first place. This level of precision has now [entered](#) the [TV world as well](#).

Similarly, a [Facebook Custom Audience](#) can help you reach individual people with messages optimized to move them. As Trump found in 2016, Facebook's ability to "retarget" people who interact with specific content or who visit your website also provide ways to convert someone's passing interest into a durable connection. Your own email list constitutes a target in waiting, since you can break it into specific segments based on supporters' giving history, past participation in online actions, location or [social media activity](#).

Key to all of these applications is data, of course. Also key? Money. The more, the better: online ads aren't free.

Despite its usefulness, though, [microtargeting is far from a panacea](#). Precisely targeting TOO much content can be a problem, and not just because your data model might not include the right voters. A microtargeting mindset can miss the need for broad messages that touch voters at an emotional level, including people your data miners might have missed. Put simply, [candidates need to stand for something](#), not a million things depending on whom they're talking to. As always, it's a question of balance — microtarget to deliver a precise message to a few, but complement it with outreach to the many.

## Money, People or Both?

The fact that you CAN buy targeted ads in bulk means that they become a button you can push: insert the check and the ads pop out. Will they also encourage a manipulative mindset, a return to the attitudes of the era when broadcast TV advertising dominated politics? The ease of targeted digital ads could encourage political professionals to treat the voters like clay to be shaped — as bystanders, not actors themselves.

My guess: we'll see a mix of the two strategies, often in the same campaign. Done right, online ads and field organizing work together, reaching voters with consistent messaging across many points of contact. Voters not reachable digitally may be easier to find in person — or vice versa. But I also suspect that we'll continue to see a tension between ad-targeters and those with a grassroots mindsets...particularly when it comes time to allocate campaign budgets. Note that Bernie Sanders may have been famous for his people-powered campaigns, but his team also [spent heavily](#) on [digital ads](#) in both of his attempts to win the White House.

## 6. Grassroots Tech

Donald Trump inspired another big development in the world of digital politics, though inadvertently. The movement to oppose his political agenda [encouraged a wave of activists and entrepreneurs to create new mobilizing tools](#). As I put it [then](#):

Finally, let's not forget the 2018 tech that we can't predict because it hasn't been invented yet. Perhaps Trump's most striking "achievement" has been his inspiration of a mass movement against him and his agenda, which has already borne fruit in upset Democratic victories in special elections from Alabama to Oklahoma.

Also ripening on the vine? Tech innovations large and small, enabling grassroots political organizing across the country. Technology doesn't have to be new to be newly useful in politics, either: the explosion of Indivisible groups in communities large and small proves the power of [Google Doc activism](#). At the higher end, companies like [the ones championed by Higher Ground Labs](#) hope to revolutionize the way campaigns do the work of reaching out to voters.

Democrats have no monopoly on innovation, of course, and Republicans are building new small-dollar [online donor networks](#), [online donation hubs](#) and [field programs](#) to try to hold on to governorships and congressional seats in November. But the energy seems to be on the Left this time around, and it's not limited to party-driven initiatives.

Some will see the lack of central leadership in the Resistance as a fatal flaw, but with no big trees to block the light, a thousand green sprigs are thriving. Most local activists started with little more than determination, but they're learning fast about the tools, technologies and tactics that facilitate change. Who knows what they'll be teaching the professional political class a year from now?

That grassroots enthusiasm has waxed and waned and waxed again in the years since I wrote those words, but many voter-contact technologies sparked by a desire to beat Trump have already become part of the standard Democratic campaign toolkit. In particular, check out the Field Organizing chapter for more about cutting-edge relational organizing tools.

## 7. Online Advertising for the Masses

Any online communicator can buy Facebook ads or Google search ads, an example of how online advertising has democratized over the past two decades. Self-serve advertising portals let small businesses, tiny nonprofits and local candidates set up a basic advertising campaign in a few minutes. Big campaigns may still work through a Facebook rep or an ad agency to place ads in large numbers, but the masses are now in on the game too.

Around 2012, the self-serve model began to move into the world of digital video ads and banner ads, and several political ad vendors now offer platforms for campaigns to buy their own voter-file-targeted online ads in bulk. These self-serve ad portals let small campaigns reach voters with the same targeting tools as the big boys, with minimum buys in the hundreds rather than tens of thousands of dollars.

The result? [A flurry of online advertising in state and local races](#). As we've seen repeatedly in this book, targeted digital advertising can be a great fit for many campaigns, with important benefits for those in convoluted districts or crowded media markets. It's a great example of a longer-running trend: the [the down-ballot evolution of technologies originally designed for national-level campaigns](#).

## 8. Bots, Trolls, Hacks and Fakes

If we had any illusions about Bad Hombres in U.S. politics, the last few years should have broken them. In 2016, [Russian hackers](#) and [bot-nets](#) did their best to heighten the discord in our politics, dancing on the raw nerves in our culture to pit group against group, sometimes [literally](#). After this experience, it's obvious that any candidate can be on the receiving end of lies spread online, whether it's amplified by a bot-net or your crazy uncle. In this environment, every campaign should plan for rapid response against a digital smear. Pro Tips: mobilize your supporters to speak on your behalf, and be sure not to repeat the lies as you fight them. Looking ahead, if you thought fake news and Facebook data breaches were bad, [wait until AI-created fake video becomes commonplace](#).

Likewise, [campaign cybersecurity cannot be an afterthought!](#) Every campaign, activist organization and individual advocate needs to think about basic measures like secure passwords, two-factor authentication and virtual private networking apps. Also take a look at third-party tools designed specifically for campaigns, journalists and interest groups.

## 9. Outside Actors

Of course, plenty of "legitimate" outside groups also try to influence elections, including SuperPACs and 501(c)4s. Most Independent Expenditure groups have poured [the bulk of their money into TV](#) in the past, but look for outside groups to [invest heavily in digital advertising](#) these days, in part to [pick off the shakiest parts of their opponents' coalitions](#). For inspiration, note the [the integrated online/offline campaign waged by a SuperPAC](#) that helped beat David Vitter and put a Democrat in the Louisiana governor's mansion late in 2015. Or, look at the [targeted digital ads](#) flying during the [the Great Obamacare Battle of 2017](#), [Congressional special elections](#) in the Trump era and [the Georgia Senate double runoff early in 2021](#). Finally, [liberal activist communities like Daily Kos](#) and many

thousands of individual small-dollar donors have [fueled insurgent Democratic campaigns and organizations](#), at times [raising hundreds of thousands of dollars](#) almost overnight. Unfortunately for Dems, however, 2020 exposed [the limits of using political money to buy electoral love](#).

Of course, if you're a local candidate, you might not have big outside groups intervening in your election. You might have upset local residents intervening instead! Either way, your own supporters are likely to be your best allies. Encourage them to be your ambassadors in their own social circles.

## 10. Integrate or Die

In 2023, a campaign can't just throw things at the wall — the parts need to work together. For example, a single ad campaign might tie data from mobile phones, desktop computers and TV together to reach specific voters regardless of which screen they're watching at the moment. This kind of data-driven, cross-channel targeting will help campaigns catch the right people with the right content at the right moment, whether they're watching cable, streaming a movie or listening to a podcast.

"Audience-based" TV advertising, which [the Obama 2012 campaign](#) pioneered in the political world, may be part of the mix. Rather than buying space on a particular channel or show, this tactic matches data models of targeted voters with TV cable set-top box data and demographic information to [reach exact segments of the electorate at the most cost-effective times](#). Combine this approach with in-app TV advertising and mobile ads, and you're approaching our future multi-screen nirvana.

**Bonus takeaway: ad-driven voter contact is becoming less about targeting channels and more about targeting people.**

Data integration isn't all that sexy — unless you really, really get into mingling ones and zeroes — but it's a secret hero of digital politics. The tools have powerful potential, but all the data in the world won't help you if you can't organize it, connect it and put it to work.

Think of all the data sources campaigns can access: fundraising lists, voter files, grassroots contacts, commercial information, demographic data and much more. Making all those pieces talk to each other is a major task, one that even seriously [data-focused campaigns can't solve perfectly](#). The most effective data-driven campaigns will be ones that 1) understand the data they have or can have, 2) connect different data "silos" to create integrated systems, and 3) use that data to make better decisions about how, what and when to communicate with voters. Ideally, the system will also incorporate [feedback loops](#), so that information gathered via one source can affect the rest. If someone signs up on the email list from a given neighborhood, the local field organizer should know about it!

## Everything You Just Read is Wrong

Well, maybe it's not ALL wrong, but plenty will happen in 2023 and beyond that we can't predict. Some trends that look significant now may not play out that way in the end, and strategies that work well one month can yield eyeball-melting failure the next. That's what keeps this business fun! We'll revisit these trends on [Epolitics.com](#) regularly in the months to come.

# 18. Conclusion

---

## Now YOU Have the Power!

That's it for the essentials of digital politics and advocacy...not bad at all! Of course, online tools aren't likely to win many fights on their own (fundamentals like the candidate and the issues 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.

Not-so-bold prediction: online ads, online recruiting, online messaging, online mobilization and online fundraising can (and will) make a difference in elections for the Senate, Congress and state and local offices in 2023 and beyond. TV still matters, field organizing DEFINITELY still matters and political direct mail has its place, but for more and more political fights, the key battlefield is virtual. Ignore it at your peril.

**And if you need help putting these lessons into practice, or you're a journalist working on a story, [let's chat](#).**

## Related Articles/For More Information

Each chapter in this book contains links to relevant content, including articles that often go into more depth than room allowed in this guide. You can also email author Colin Delany at [cpd@epolitics.com](mailto:cpd@epolitics.com) with questions.

## More from Epolitics.com

- [Learning from Obama: Lessons for Online Communicators in 2009 and Beyond](#) [ebook]
- [How to Create a Super-Advocate Program](#), written in conjunction with online advocacy software vendor Blackbaud.
- [A Quick and Dirty Guide to Digital GOTV](#)
- [Epolitics.com itself](#), which covers all of the topics discussed in this book and more.
- For information about campaigning during a pandemic, be sure to refer back to the standalone chapter earlier in this book.

## Outside Resources

- Epolitics.com doesn't have a comprehensive guide to the Obama 2012 campaign, but you can [check out "Inside The Cave,"](#) prepared by Republican consulting firm Engage. It's good stuff.

- Two sites that I check all the time are [Political Wire](#) and [Campaigns & Elections](#). Between the two of them and [Epolitics.com](#), you should catch most of the major digital politics-related stories in the U.S. you need to know about.
- For more on political organizing broadly, [the Indivisible guide](#) is invaluable.

**Now, let's go change the world!**



Image: ©iStock/Nlpitphand

## About the Author



### Colin Delany

Colin Delany is a 27-year veteran of online politics, a digital strategy consultant and the founder and editor of [Epolitics.com](http://Epolitics.com), a website that has long focused on the tools and tactics of internet politics and online political advocacy. Delany began his political life as a staffer in the Texas Legislature, where politics is considered a contact sport. He later co-founded a targeted search engine for politics and policy during the dot-com boom (which went about as well as such things usually did). He is the former digital director of the National Environmental Trust and the National Women's Law Center.

**Delany now works with advocacy organizations, charities and political groups around the world as a consultant** to help them leverage digital tools to achieve their communications, activism, advocacy, fundraising and electoral goals.

Delany is a sought-after trainer and speaker on topics related to digital politics, social media and online communications. He has spoken at conferences ranging from South by Southwest Interactive to Netroots Nation and Organizing 2.0 and at universities including Harvard, Georgetown and the London School of Economics. He was honored as one of "Ten Who Are Changing the World of Politics and the Internet" at the 2010 World E-Gov Forum in Paris, and his digital advertising work in the 2020 election cycle won a political-industry Reed award.

He is also the author of several ebooks, including the digital campaigning guide "How to Use the Internet to Change the World - and Win Elections" (currently in your hot little hands) and "Learning from Obama," a definitive overview of the groundbreaking 2008 online campaign for president. Besides Epolitics.com, he also writes [a monthly column](#) for Campaigns & Elections.

Born in New Orleans and raised in East Texas, Delany now lives in the Mt Pleasant neighborhood of Washington, DC. He plays bass in a kickass rock and roll band.

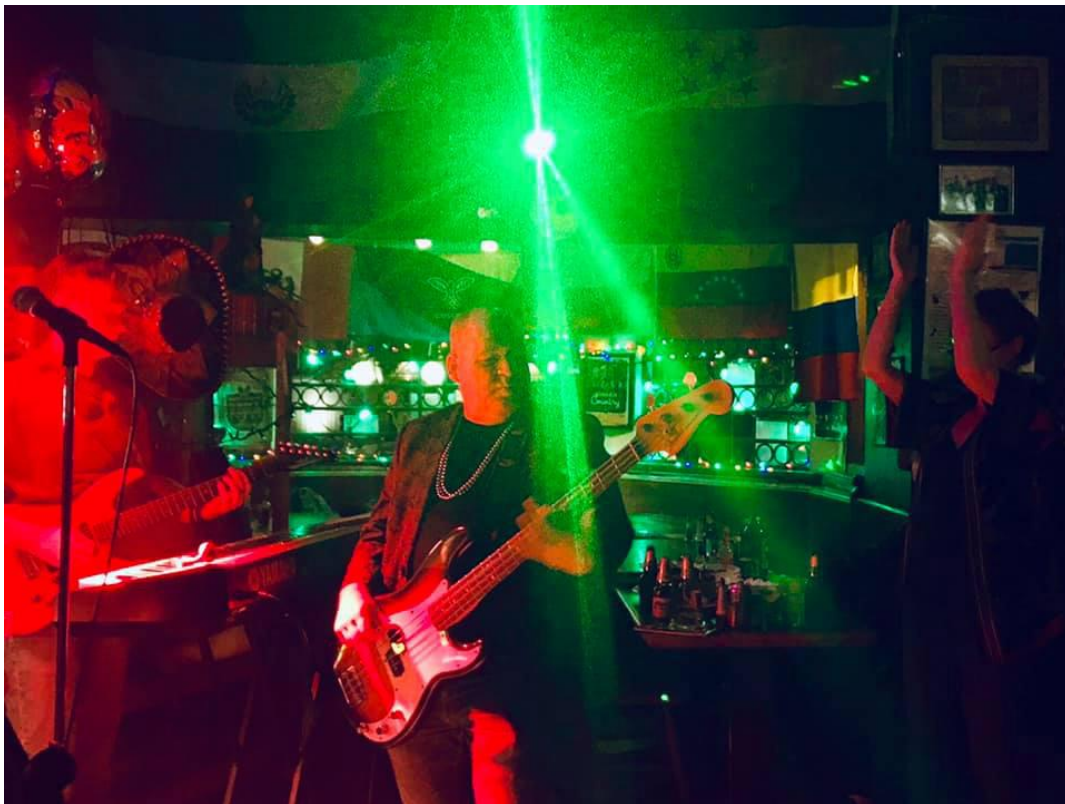
For media or consulting inquiries, please contact [cpd@epolitics.com](mailto:cpd@epolitics.com) or (+1) 202-422-4682. You can also follow him on Twitter at [@epolitics](#).

## About Epolitics.com

Launched in July of 2006, Epolitics.com covers digital politics, advocacy and communications in depth. A must-read for internet politics beginners and professionals alike, the site has featured the voices of dozens of practitioners on topics important to the field and includes well over 2600 separate articles as of 2023.

Epolitics.com received the Golden Dot Award as "Best Blog - National Politics" at the 2007 Politics Online Conference. It was also named "Blog of the Year, Non-Spanish Language" at the 2013 Poli Conference.

Epolitics.com welcomes new insights and perspectives. If you have an idea, tutorial, best practice or case study that might be a good fit for our readers, please [contact Colin Delany](#).





# Appendix: Political Campaigning & Political Advocacy During the Coronavirus Pandemic

---

The coronavirus pandemic upended the plans of political campaigns and advocacy organizations. For example, physical distancing rules largely put the kibosh on rallies and door-knocking in 2020, and even after they've been relaxed, many people may be reluctant to gather in groups or open their doors to strangers with clipboards. Meanwhile, voters have moved online and campaigns have rushed to follow them.

Campaigns and advocacy organizations were forced to adapt quickly in three main areas:

- Internal processes
- Media-buying
- Field organizing

As a result, they:

- Shifted to videoconferences and digital project-management tools instead of in-person meetings, with staff working from home.
- Trained and mobilized volunteers via online video, webinars, conference calls, emails and texts.
- Emphasized paid digital advertising to reach voters spending more time online, whether reading websites, watching streaming video or browsing social media.
- Invested in list-building via digital advertising and organic online outreach.
- Held online chats and virtual town halls.
- Recruited online influencers to act on the candidate or cause's behalf.
- Encouraged supporters to evangelize in their own social/digital circles.
- Explored relational-organizing tools to more-formally tap supporters' social connections on the campaign's behalf.
- Shifted field outreach and organizing tasks to social media and mobile phones.
- Moved from in-person voter contact to virtual phone banks and peer-to-peer texting.

As the pandemic settled in and countries, states and local governments eased their restrictions, many traditional campaign activities came back to life, though not quickly enough for some campaigns (see: [Virginia Democrats in 2021](#)). Still, campaigns will likely be dealing with at least some of the fallout from coronavirus in 2022 and beyond. For more information, see the resources gathered below. And, be sure to consult the relevant chapters in this book as well.

We'll also be updating [Epolitics.com](https://epolitics.com) with resources and news coverage.

## Top-Level Guides & Resource Collections

- [Navigating Political Campaigns & Coronavirus](#). A good introduction.
- [Political Campaigning in the Time of Social Distancing](#). Downloadable guidebook.
- Organizing While Corona [guide](#) and [articles](#).
- [Campaigning During The Coronavirus](#). Links, tips and how-tos from the South Carolina Democratic Party.
- [Nonprofits and Coronavirus](#). Useful resources for advocacy organizations.
- [Community Building \[Political Organizing\] During The Coronavirus](#). From Indivisible.

## How-To Articles

- [4 Ways To Keep Your Fundraising Program Active During COVID](#).
- [Digital Strategy for Political Campaigns During the Coronavirus](#).
- [How to Adapt Your Capitol Hill Outreach Strategies During COVID-19](#).
- [Staying Engaged With Your Advocates During A Pandemic](#).
- [Lessons Learned From Organizing During COVID](#).
- [How COVID-19 Could Reshape Digital Persuasion & GOTV](#).
- [How To Connect With Audiences Sheltering In Place](#).

## How Campaigns are Adapting

Many news stories looked at how campaigns are adjusting to the pandemic, and the articles below may spark some ideas. If you're reading this piece in 2022, a quick Google News search may turn up more recent examples.

- [Biden's campaign rushes to blunt Trump's digital advantage](#) (a good overview of presidential-level digital campaigning).
- [MAGA Babe, Hillary Toilet Paper and Al Gore: The Weird World of the Virtual 2020 Campaign](#).
- [As America Stays Home, Candidates Turn To Digital Organizing Tech](#).
- [How to Canvass During a Pandemic](#). "Progressive insurgents are reimagining their campaigns thanks to the coronavirus."
- [No pressing the flesh, but candidates learn to campaign under COVID-19](#).

- [Kept home by COVID-19, U.S. politics goes virtual with digital dance parties and avatars.](#)

