How to Campaign like Obama

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making campaigning count

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How to improve your e-campaigning:

1. **Participate in the eCampaigning Forum.** A two day gathering of some of leading experienced campaigners, Takes place in March/April annually. It brings together leading campaigners, communicators, fundraisers, campaigning managers, practitioners and service providers in an intense exchange of expertise and ideas. Find out more at http://fairsay.com/ecf

2. **Participate in the 2010 eCampaigning Review**: a three-part **benchmarking project** that features an analysis of organisations' e-campaigning data, the survey results of organisations' e-campaigning practices and a review of online campaigning actions. See the 2009 report at http://fairsay.com/ecr09

3. **eCampaigning Training for senior managers**, campaigners, practitioners or fundraisers. This can accelerate the learning of e-campaigning knowledge, strategy and best practices to ensure e-campaigning effort and budget is best used to achieve the campaigning objectives. In-house trainings or open trainings can be arranged. See http://fairsay.com/trainings

4. **eCampaigning mentoring and coaching** is available for managers and practitioners. This is good if training isn't feasible and yet specific people would benefit from one-to-one advice via phone or in-person. Email me at duane@fairsay.com if you are interested

5. **eCampaigning Strategy, Review, advice and support** is also available. After a decade of e-campaigning experience (two decades of working with the Internet) and having worked with some of most successful campaigning and e-campaigning organisations, I can be an invaluable to ensuring your e-campaigning contributes to your campaign and organisational objectives and priorities. See http://fairsay.com/what-we-do

6. **Explore the FairSay website** with a growing collection of blog posts, event listings, tool links, articles, videos, podcasts and research on campaigning and e-campaigning and more. See http://fairsay.com

Regards,

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About FairSay

FairSay provides advice and support on campaigning and how to used interactive media to contribute to achieving the campaigning objectives. FairSay works from an evidence-based approach to ensure that campaigns focus on what works and/or how to determine what works. FairSay's most popular services include developing an e-campaigning strategy, undertaking an e-campaigning review, running e-campaigning training and providing hands-on support. FairSay also organises the annual eCampaigning Forum event. For more information see fairsay.com

About Duane Raymond

Duane founded FairSay in 2004 to help campaigners and campaigning supporters get a fair say in shaping their world. He worked as Oxfam GB's pioneering eCampaigning Manager from 2001-2004 where he helped Oxfam GB and Oxfam internationally achieve a massive increase in the number of campaigning supporters online. He has worked on national campaigns, global campaigns and coalitions campaigns including some of the largest and/or most successful campaigns in the last decade. To contact Duane, email duane@fairsay.com

This article is written just with what I know about campaigning, e-campaigning and what I observed, read and heard about the Obama campaign.

Duane Raymond
21 February, 2010

1   How to Campaign like Obama

Obama's 2008 campaign for the US presidency (and for the US Democratic party's nomination) is widely viewed as one of the most effective campaigns ever run. Campaigners around the world are looking to learn from it. Here's some help by debunking the myths and highlighting the critical success factors.

Over the last five year, journalists have repeatedly claimed that the Internet was the decisive factor in winning a campaign. This occurred frequently with the Obama campaign (2007-8) and more recently (January 2010) with Republican Scott Brown's campaign in Massachusetts, USA.

Understanding the real reason they won and the what role the Internet and other digital media played in that win are crucial for campaigning practitioners and managers to know what are priorities and know what contribution digital media can have a campaign.

1.1   The Fundamentals of Campaigning

Before any campaign starts, there needs to be a power analysis: an assessment of where the 'power' to achieve your goals lie and how to influence it. For elections it is very clear: power is with voters and you need to be their best choice for the leadership they wish to see. For non party-political campaign, it is usually less clear.

Thus, regardless of if it is Obama's Campaign in 2008, Republican Scott Brown's campaign in 2010 or any other politician, the fundamental strategy is to:

1. **Get existing supporters to vote for you** (and/or your agenda) - not just say they will vote for you.
2. **Convince** non-affiliated voters that are favourable to your agenda to vote for you. This includes ensuring they are on the electoral register.
3. **Convince** those truly **non-affiliated** and those non-affiliated who are only slightly unfavourable to your party to vote for you
4. **Demoralise**, seed doubts in or de-motivate opposition supporters so they don't vote (usually not explicitly as that would likely backfire)

In 21st century politics, getting existing supporters to vote is necessary but not sufficient. Getting non-affiliated support is

crucial, but most will already favour a party so the key is to get them to actually vote. Note that many people (including many journalists) believe the myth that real power is with the independents - but political scientists have discredited this for decades[1].

This fundamental strategy applies to non party-political (civil society) campaigns too (assuming the power analysis results in the same conclusion: inspire and mobilise large number of people to act). However campaigns are complex and it takes getting many things right for them to succeed. I'm going to explore how Obama did it and debunk some myths journalists and others use to oversimplify his (and others') success.

Campaigning like Obama isn't difficult if you have the right priorities and people with the right expertise - but are almost impossible without that. Unfortunately these are exactly the areas on which most campaigning organisations compromise. Yet if you are determined to apply the learning from the Obama campaign in your own campaigning, here is what you need to know.

The goals of the Obama campaign were simple:
- fundraise,
- convince voters
- get them to vote

1.2 How Obama Won

We all know that campaigning is most effective when all campaigning activity is aligned. Before I go into how to campaign online like Obama, I'll first explore how to campaign like Obama.

The goals of the Obama campaign were simple: fundraise, convince voters and get them to actually vote. Unfortunately not all civil society campaigns have (or can have) such clear goals.

The key factors in Obama's campaign success in achieving this were:

1. **Obama's has experience as a 'local campaigner'** (a 'community organizer' in US English): someone who would organise and motivate local communities to fight for an issue against an entrenched institution. So how his campaign was run has real lessons for campaigners and campaigning organisations around the world - perhaps more lessons than it has for party-political campaigning. The 'field program' (4,000 paid local organisers to coordinate the volunteers) is thus cited by as the key reason Obama won. As David Plouffe put

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[1] http://www.themonkeycage.org/2009/12/three_myths_about_political_in.html

it: "There's nothing more valuable than a human being talking to a human being. Nothing."[2]

2. **Obama's personal charisma, demeanour and life story**
Obama has many qualities that appeal to people: he is an inspiring public speaker; he exuded calm when many in the US were panicking over the financial meltdown and his life story. For a campaigning non-profit, the equivalent would be campaign message: does it appeal to the intended audience?

3. **Opportunity**: disillusioned with of GW Bush and Republicans plus an economic meltdown Obama happened to be the right candidate for the time. He promised change when the opinion of the existing administration was at an all time low. He offered a calm, thoughtful response when people were panicking about the economy. He promised unity when people were sick of partisanship. He offered hope when people were losing it. For a campaigning non-profit, being in-tune with the mood and stories of the times makes a significant different in the likelihood of success.

4. **Outsider**: Obama was perceived as an 'underdog' in the campaign for a range of reasons: better financed rivals, representing the party in opposition, perceptions of his ancestry, a short history in politics, etc. This helps be seen as an alternative to everything people have disliked about the current system and government.

5. **Expertise**: talented team with the right involvement and authority

6. **Strategy**: people's campaign, inclusive, networking

7. **Integrated communication**: talking about the same thing at the same time across all channels (Obama, news, advertising, website, emails)

8. **Inspired people**: "change you can believe in" - a positive message

9. **Consistency**: he and his campaign stayed on message and united

A suitable 'formula':

Planning
+ Message
+ Opportunity
= Success.

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[2]

http://www.marketingmag.ca/english/news/awards/article.jsp?content=200906
25_143948_5624

10. **Proactive**: they anticipated, outsmarted and outpaced competitors

11. **Tactics**: local everywhere - face-to-face, Internet, media

Obama's experience as a local campaigner (called a community organiser in the US) was crucial for many of these areas. The principles of campaigning locally - focusing on people and personal relevance - infused all parts of the campaign.

Most organisations focus on the message: researching it, planning it and delivering it. Very few do comprehensive campaign planning (including contingency and continuity planning) and are organised to rapidly take advantage of opportunities. It is not money that buys these, but priorities and expertise.

1.3 The General Campaign Myths

1. **Myth**: you need a lot of money.
   Fact: While Obama's campaign ended with more than $600 million USD, it didn't start with much money. It was able to raise that much money because it had the right priorities from the beginning and remained committed to them throughout. What it did was invest in the right areas from the beginning.

2. **Myth**: All of Obama's donors gave $200 or less
   Fact: A majority of Obama's donors gave $200 or less each time, but only 26% had a total contribution of $200 or less[3] (the same as George Bush in 2004). Obama's real fundraising success was in encouraging repeat donors.

3. **Myth**: Obama's campaign had lots of staff
   Fact: By the end of the campaign it has lots of staff, but at the beginning it focused on having the right staff for that stage.

4. **Myth**: Obama's campaign's use of the Internet was instrumental in its success.
   Fact: I'd love for this to be true. While the Internet was one of the key tools for the Obama campaign, it was the way the Obama campaign synchronised it communication strategy across all channels and used each for its strengths that helped him win. The Internet was only one of these channels.

Review the campaign plan

FairSay can help prepare or improve your campaign plan by ensuring that the plan:
1. has the **prerequisites** for good e-campaign planning
2. **integrates** e-campaigning with campaign plans
3. has realistic plans for e-campaigning, including effort, budget, strategies and benefits

Email: duane@fairsay.com to explore possibilities

Top Campaign Myths:
- you need a lot of money
- donors gave $200 or less
- the campaign had a lot of staff
- the campaign's use of the Internet was instrumental in its success

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[3] http://foolocracy.com/2008/11/myth-small-donors-dominated-obama-campaign-fact-small-and-medium-donors-did/

1.4 The Obama Campaigning Model

Many people think there is a new 'Obama' campaigning model. However everything the Obama campaign did, someone else had done before. So what made the real difference? Best practice.

While everything the Obama campaign did has been done before, others did a few things well. The Obama campaign focused on doing everything well. This meant they got a tremendous multiplier effect by being effective across all areas of the campaign. For example:

- **Contingency planning**: They identified Obama's potential weaknesses, produced their own anti-Obama ads and then tested them on focus groups with a range of counter-strategies. Thus when their opponents used them, they knew how to respond (or not respond) and could do it within hours.

- **Continuity planning**: They put time into planning for phases of the campaign that they may never have got to, but if they did they would be ahead of opponents. For example they had a team working exclusively on the plans for post "Super Tuesday" - the day in the process to select each party's candidates when so many states vote that there could be a decisive winner. There was also a team working on the strategy and implementation of the transition to the presidency before he's even won.

- **Empowering supporters**: the communication constantly emphasised that this was not just about Obama; it was about the ability of the American people to bring about change. This went beyond rhetoric to practice by encouraging, directing and supporting people to self-organise - including giving them the tools and information to do so and letting people tell their own story in their own way of why they supported Obama.

- **Daily Alignment**: all channels needed to be on the same topic on the same day. Thus when Obama spoke on a topic, this would be reflected in the advertising, by volunteers knocking on doors as well as in emails and on the website.

- **Nimbleness**: responding within hours via email and online video often meant scooping mass media.

- **Analysis**: It is said that Carl Rove, architect of GW Bush's two wins, was a data-geek. The Obama campaign took this

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Contingency planning:
e.g. they identified Obama's potential weaknesses, produced their own anti-Obama ads and then tested them on focus groups with a range of counter-strategies.

If their opponents used them, they knew how to respond (or not respond) and could do it within hours.

How to ensure continuity

Continuity requires **anticipating** future phases and **acting** on them in advance. For example what happens *after* the key demand is won or the key event of the campaign passes.

Peta did this exceptionally well with their animal welfare campaigns focused on Burger King, McDonalds and Wendys. They focused on one at a time, but each time they won, the next campaign was ready with a full website. This allowed them to focus the media coverage they received in winning to the new campaign.

one step further and not only had an analysis team, but used its supporter network to collect more real-time data. As a result, they could adapt their strategy and tactics daily to what they were finding.

Top lessons:
- Planning is crucial
- Analyse performance
- Audience-centred
- Invest in experience
- Plan for scaling
- Combine campaigning with donating

Analysis is very strategic

Most organisations fail to do any analysis. For those that do, it is usually simplistic and not very insightful.

Successful political parties and companies all have analysis as a core strategic activity. Even fundraisers do some. Campaign analysis is crucial to focusing time and budget on the most effective strategies and tactics.

FairSay can do quantitative and qualitative analysis for your campaigns. This can be either as a baseline for future analysis or a review at key milestones.

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- **Online, email is crucial**: They focused on using email for campaigning online, with the primary objective of all social networking presences to direct people to sign-up for emails on the Obama site. This had been best practice for over a decade and will remain best practice for the foreseeable future despite Facebook, Twitter and whatever else comes along. Email is still the best medium to directly and repeatedly reach supporters.

- **Hiring experienced people**: The Obama campaign hired people who had doing it before, knew where to focus and what to avoid. They also hired enough people to do the jobs required so each person could do their job well.

1.5 Lessons for Campaigning Organisations

So what should campaigning organisations learn from this?

1. **Planning is crucial**. In addition to policy research, audience research and a campaign strategy, but also power analysis, target research, continuity plans, contingency plans. This includes planning so that opportunities can be seized when they arise.

2. **Analyse performance**. This keeps you focused on what works and provides insights to keep you ahead of the targets. The science of campaigning is just as important as the art. Take data analysis seriously or be doomed to waste money, time and get off-track.

3. **Audience-centred** public communication: it's about them and their passions, not you. This applies even to evidence-led organisations (vs. member led): even with the agenda determined by the evidence, the messaging to the public and supporters need to be about how it is relevant to them. For a diverse audience or a locally relevant issue, this means segmented communications.

4. **Invest in experience**. Hire a specialist. Give them responsibility and autonomy. Get training for existing staff or individual weaknesses. Run small scale experiments. Stimulate specialists and support staff with feedback from

performance analysis. Just don't pile it on overworked staff (at least without removing other work), new graduates or interns. Knowing how to communicate does not mean you can campaigning effectively.

5. **Plan for scaling**: the resources (people's time and budget) it took to double or triple supporters or donations need to be increased to continue succeeding. If they do not increase, not only will success slow, but it may actually reverse if the successes (e.g. new recruits, donations) are not nurtured.

6. **Combine campaigning with donating**. Results from a growing number of organisations are showing that donating around campaigning actions works and is accepted by supporters. It doesn't mean abandoning dedicated fundraising efforts, just adding fundraising as an option for campaign planning (e.g. to fund a stunt or the campaign).

Is winning your campaign important enough to be smart with your campaigning?

1.6 Smart Campaigning

Applying these strategies, principles, priorities and practices not necessarily easy, but they are smart. The key question: is winning your campaign important enough to be smart with your campaigning?

What it takes to be smart with campaigning is what the Obama campaign team had: informed leadership from the top and people with the right skills and knowledge. Sadly, most campaigns have gaps in both areas and either fail to recognise them or fail to resolve them. The best time to start resolving them is now.

Ultimately smart campaigning means that if it can be won, it is won sooner. That saves money in the long term and is easier than trying to fix things along the way. Perhaps what is thus needed is an investment plan for campaigns than spans the budget cycles and allows a strong foundation to be established.

"[Online activity] can't exist under fundraising or communications. It really needs to be a parallel operation so you can manage competing interests"

Thomas Gensemer
BSD Managing Director

2 How to eCampaign like Obama

In 2008, one element of the success of Obama's campaign to be elected US president was down to how his campaign used the Internet. With the right priorities, people and strategies, you can e-campaign like Obama too.

When you think about the Obama Campaign for US President (2008) or Republican Scott Brown's 'surprise' election as US Senator (Jan 2010), one of the aspects many people focus on is the way the campaigns used the Internet. While the Internet was an important channel for the campaigns, there were many factors that contribute a campaigns' success.

2.1 Obama's Secret to Internet Success

Obama's campaign was widely acknowledged as being highly successful online. Obama's Democratic and Republican competitors all had Internet activities. Most were even run by veterans of the Howard Dean campaign in 2004 that pioneered the approaches Obama's campaign used (which itself copied and adapted the techniques non-profit campaigning organisations had been using from years, especially MoveOn.org).

So if the strategy and tools were not new, what made the difference? Joe Rospers, the Obama Campaign Online Director spoke at an event I attend in December 2008 and confirmed what I suspected. The difference was that the Online Director (Rospers) had autonomy and authority and had a direct presence at all top-level meetings.

Rospers was one of the first people hired to the Obama campaign before there officially was an Obama campaign. He attended all of the top campaign meetings and regularly shaped the campaign strategy and messaging. He had authority and budget to hire people and implement the tools necessary (he was on secondment from Blue State Digital (BSD) which provided the tools the Obama campaign used).

Obama's competitors had people with similar skills, but they were constrained by the hierarchy, usually reporting to a communication director who participated in top meetings and had budget and hiring authority. Giving Rospers a seat at the top table gave the Internet more autonomy and priority in the Obama campaign, including influencing relevant offline aspects of the strategy, and thus set itself up to have highly successful Internet activity.

This seemingly small difference has multiple impacts:

1. **Direct experience with online campaigning at the senior level** means direct participating in shaping the overall campaign as well as strong vision and leadership for the team delivering the campaign online.

2. **More attention** for delivering online campaigning because it isn't just one of many areas of responsibility of a communications director.

3. **Fast decision making and implementation** because little or no negotiation is needed to divide resources since the resource available for online campaigning are already known.

4. **Ability to set priorities based on experience and evidence** rather than perceptions and hype (e.g. email vs. social networking).

2.2 The eCampaigning Myths

While many people underestimate the power of having an e-campaigning expert at the top table, they also overestimate or miss-attribute other factors. The top myths about Obama's e-campaigning are:

1. **Myth**: The Obama campaign used new / novel tools
   Fact: No new tools were used that others had not used before. The Obama campaign integrated, optimised and managed existing tools by people with the appropriate expertise and time.

2. **Myth**: They had a large budget for Internet activities
   Fact: They had a relatively small budget to start with. However they knew the return from the online work and as this return was realised, their budget grew accordingly.

3. **Myth**: They started with a lot of staff to run Internet activities
   Fact: They started with the online director and hired the right people at the right time as the growing budget allowed. They ended up with a large team (81 staff, almost 100 volunteers).

4. **Myth**: They started with a large online supporter base
   Fact: They started with no online supporter base. However they had lots of potential supporters since there was already considerable excitement around Obama's candidacy and they

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Top eCampaign Myths:
- The campaign used new / novel tools
- They had a large budget for Internet activities
- They started with a lot of staff to run Internet activities
- They started with a large online supporter base
- Social networking sites were important to the campaign

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had a fantastic launch and were ready to convert the potential into actual supporters.

5. **Myth**: Social networking sites were important to the campaign
   Fact: Rospers has said that the value of supporters on social networking sites was in the "single digits", so fewer than 10% of support originated from the social networking sites. While they had a lot of membership (5 million friends) and publicity around their social networking support, it produced little tangible results in terms of donations or participation. It likely helped recruit some supporters and supported the impression of a youthful and trendy campaign.

2.3 Being Online Matters, but for Different Reasons

When journalists and others allude to the fact that Obama won the because of the Internet, they were mostly wrong. Being online still matters, just for different reasons than most think: the marginal boost it provides and the perception it generates (and/or prevents) if the campaign appeals to people.

Ultimately, it is not being online that matters, but getting more attention and harnessing it. Online provides a relatively small boost in getting attention since the herd-behaviour of mass media still reaches almost everyone at the same time. However this attention from mass media is fleeting and cannot be sustained. Online is an excellent medium for sustaining and deepening attention once contact details (e.g. email address, mobile phone number) are obtained. Then attention can be sustained independent of mass media by sending regular, direct and timely communication to supporters.

In addition to this tangible benefit of campaigning online, there are other benefits. For politicians and organisations, being online:

1. Shows they are **suitable for today and the future**, not stuck in the past
2. Shows they **adapt to new trends**
3. **Bypasses and extends on mass media coverage** for candidates and supporters (un-filtered message)
4. Makes them **seem more approachable and genuine**
5. **Strengthens inter-supporter bonds** by connecting them to each other
6. **Builds supporter commitment** through doing things for candidates (favours/volunteers)
7. Enables and supports people to **self-organise**

Being online still matters, just for different reasons than most think: the marginal boost it provides and the perception it generates (and/or prevents) if the campaign appeals to people.

8. Allows the **crowd-sourcing**[4] of campaign data collection, idea generation and a local presence everywhere
9. Allows the opposition to **capitalise on dissatisfaction with the current regime**: online is an unofficial channel to confront, counter and parallel government / official channels

2.4 Obama's eCampaigning Formula

Technology was only one factor in Obama's success. His real e-campaigning success came from having:

1. People with the **right expertise**
2. **Strong strategy and plans** (campaigning and e-campaigning)
3. **Power**: top level involvement, budget and decision making authority
4. **Integrated** and coordinated activity with the broader campaign
5. A **compelling message** and ask
6. **Tools** that allow the strategy and integration to be implemented and measured

All these online success factors build on the overall campaign success factors, including being seen as an underdog. The Internet is a particularly good medium for opposition because it is unconstrained by the rules and activity of governing. Being perceived as the underdog is relevant for both the Obama campaign and the Scott Brown campaign and translates particularly well on the Internet were it is relatively easy to organise dissent. Thus Organising for America (the post-election name for using the Obama campaign online network and resources) is less appealing now that Obama is the sitting US president.

Not only are people less inspired to support a sitting president's agenda, but the 'energy' of the Obama campaign has now been replicated by the Tea Party movement: the conservative movement that has sprung up to oppose Obama's agenda now that the Republicans are the opposition.

Obama's experience as a local campaigner (called a community organiser in the US) was also crucial online. The principles of campaigning locally - focusing on people and personal relevance - infused all parts of the campaign and are particularly relevant online. When the Obama campaign asked people to take action,

The formula for Obama's e-campaigning success:

**Expertise
+ Planning
+ Power
+ Message
+ Integration
+ Tools
= Success.**

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[4] Crowd sourcing: the use of supporters to do work that would otherwise have to be done by paid staff

some were online actions like donating and promoting. Yet other activity was offline like organising house parties and canvassing door-to-door. Differentiating between online and offline activities is thus an artificial divide because online communications got real people to help offline in real ways. Online was simply another communication channel.

2.5 Obama's Digital Tools and Practices

I've said that the Obama campaign used no new tools. So what tools did his campaign use? The most used were:

1. **Email**, especially fundraising: constantly updating supporters and asking for specific things they could do. Email is still the most universal and flexible way of reaching people online. By election day, the email list had 13 million members.

2. **Website(s):** the end-point of all emails, online ads, social media links, etc., it started with a prominent ask to join the campaign by providing an email address and zip code and also consisted of latest news, insider commentary, the Obama campaign social network (MyBO, 2 million accounts), downloadable content, etc. A separate voter registration site was also used with less obvious Obama branding.

3. **Online Advertising**: primarily focused on email list building: an easy, low risk asks that could be followed by other asks. Toward the end of the campaign, specific constituencies were targeted. Some advertising was also done to coincide with key milestones. Online advertising was a small proportion of the advertising budget because mass media still reaches more people, faster than online.

4. **Video**: most videos were of why people supported Obama and usually didn't even have Obama's image in it[5]. They were timely and often had local appeal. Some were even produced by supporters and adopted by the Obama campaign. The result was 2,400 videos viewed for a combined total 2,000 years.

5. **Blogging**: while the Obama campaign did have its own blog, more important was getting supporters with blogs to write about the campaign to help reach each blog's existing community.

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[5] Example video: http://www.youtube.com/watch?v=TW-6DpC-mj8

Best practice matters

Having digital tools is easy. Getting the most from them takes expertise and effort. Best practices can result in many times greater effectiveness of a digital initiative. So it is quickly worthwhile

Best practices differ for each tool and channel. Thus having someone with experience matters.

Best practices can be learnt through experience, but it is faster to learn them via trainings, mentoring or a review of current e-campaigning.

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6. **Social media**: social networks and other social media were primarily a recruiting ground for the email list. There was basic continuous engagements with key social networks, but most engagement was via email

7. **Analysis**: analysis of what was working was crucial for smart campaigning. This goes beyond split-testing emails and web pages to testing rebuttal strategies and analysing data supporters collected.

8. **Segmenting**: unlike mass media, targeting specific profiles of people online is relatively easy, and the Obama campaign did this extensively online. Auto-segmenting was by location and a number of 'tracks' exists for people to opt-into.

9. **Other**: there was also activity via Twitter, mobile phones but its overall contribution to the campaign was primarily in the perception of Obama.

2.6 How Supporters Were Put To Work

The digital tools were used to ask people to support the campaign by:

1. **Donating**: repeat donations of small amounts were one of the key differences with other campaigns past and present. Critical to this was precision timing to coincide with mass media stories, events and key milestones. 3 out of 4 donors gave online.

2. **Do-It-Yourself**: The Obama campaign provided guides, fact-sheets, videos, photos, speeches, phone scripts, data, etc. to supporters as raw materials to create their own campaign material and activities for use online, face-to-face and by phone. The result was hundreds of thousands of user-created pro-Obama videos, blog posts, phone calls, door-step visits, etc.

3. Organise / participate in **local events**: people were encouraged to organise house parties, video screenings, phone calling and other events to get supporters and potential supporters together to organise to help Obama win. The result was millions of volunteers other campaigns didn't have and couldn't match by hiring (McCain's campaign hired local unemployed people at minimum wage, and they were often Obama supporters!). They were also the origin of a lot email subscribers.

Online participation options included:
- Donating
- Do-It-Yourself
- Local events
- Local canvassing
- Collecting Data
- Fighting back
- Get-out-the-vote

These are the types of activities that could be in an e-campaigning plan and should derive from the campaign plan.

4. **Local canvassing**: supporting going door-to-door promoting Obama and armed with fact-sheets and self-printed/produced materials as well as record-keeping sheets to collect data (e.g. email addresses) and record the results of each visit.

5. **Collecting Data**: when people are interacting with others online, on their doorstep, by phone or at events they are creating a constant flow of data about who is a supporter, who's not and their perception. When structured, stored and analysed it can be more accurate than polls and surveys.

6. **Fighting back**: Obama's campaign was confronted by a deluge of unsubstantiated and potentially damaging accusations. Supporters were asked to identify them, alert the campaign and counter them via their own networks (e.g. reply-all to an email with the lies backed up with links to references). The Fight The Smears site was set up to support this. This strategy kept Obama focused on positive messages while supporters directly responded to accusations.

7. **Get-out-the-vote**: Being a supporter doesn't mean you actually show up to vote. So a get-out-to-vote effort makes voting social and attempts to remove any obstacles to you voting. On election days (primary and national), Obama supporters were emailed and texted a list of 5 others to call to see if they were going to vote. Online advertising was also used. Even lifts were offered to people who had mobility challenges.

2.7 Obama's Online Strategy

In general, the online strategy evolved over time based on what was working and what was needed at different phases of the campaign. However the general *online* strategy involved:

1. Make the campaign **about people's hopes**, not Obama's, and with the voice of a supporter, hence the slogan: Yes We Can. Online this also means multi-way communication: campaign-to-supporter, supporter-to-campaign and supporter-to-supporter. Supporters should feel they own the campaign. It means talking to people not at them.

2. **Attract everyone to the campaign website** and get them to **'join' the campaign by providing their email address** (to re-contact them) **and zip code** (postal code to identify political constituency)

The general online strategy:
- People focused
- Get email + post code
- Tap into supporters' networks
- Support self-organising

"We didn't necessarily want our supporters reading off a script.

We said 'Speak from your own heart about Barack Obama.'

Nothing is more powerful than authenticity. People can have a very sensitive bullshit meter. They'll sniff out inauthenticity in a minute, especially young voters.

Don't be a slave to scripts."

David Plouffe
Obama Campaign
Manager

3. Make **everyone** on the email **list a starting-point for further connections** with their network and community online and offline.

4. **Support self-organising**: a locally owned and directed campaign everywhere is more effective than any centrally directed campaign. Provide customer-service team to help people help the campaign.

5. **Authenticity**: respect supporter spontaneity in how they talk about and promote the campaign. This means providing direction but not enforcing a message. It also means talking to them like adults.

6. **Provide a range of options** for them to be involved so each person can determine their participation themselves. As a result, 80% of supporters did something to support the campaign.

7. **Make donating an emotional act** to immediate needs. Being timely is critical for urgency and relevance and being easy and affordable is important to encourage anyone to donate and re-donate (donors gave more than 2 times on average).

8. **Scale-up** the online team **as the fundraising results grow**. This ensures the people are there to continue engaging and mobilising supporters. Hire experienced people (300 people by election day).

9. **Provide Incentives**: Donors and volunteers were entered into draws for dinner with Obama, told that an existing supporter would provide a matching donation, were able to write a message to a new person their matching donation convinced to donate, got to attend events by taking caucus training. In many cases, the incentive was social: reinforcing you were part of a movement for change by connecting you to that movement.

10. **Focus on creating great content**. A conviction that great content is more important than great tools meant a focus on the message not the medium.

11. **Constantly improve**. Discover what is working through constant testing and analysis and apply it immediately.

12. **Anticipate success and threats** and respond proactively. One example was that a team working on building a presence

in states that held primaries after 'Super Tuesday' before 'Super Tuesday' primaries were even held. If Obama was out of the nomination on Super Tuesday, it was wasted effort. If he was still in, he was ahead of the competition. Another example was having a full presidential transition site (change.gov) up within minutes of Obama's win being announced.

2.8 Conclusion

The successes and lessons of the Obama campaign are highly relevant to NGOs because they show:

1. Expertise and planning to plan and run an effective campaign are crucial and provide a higher return than inexperienced people
2. Successful e-campaigning depends on the overall campaign being well researched and planned yet still nimble to opportunities and threats
3. Obama's campaign copied techniques and tools used daily for civil society e-campaigning. These are easily reproducible with the right expertise and priorities.
4. A well organised and integrated e-campaigning with the right priorities can make a significant contribution to the overall campaign.
5. Daily/weekly incremental improvements multiply into significant online success over the life of a campaign. This is why split-testing and analysis is so important.
6. The real barriers for many NGO organisations' e-campaigning are not tools and techniques, but expertise, research, strategy, planning, priorities, budget, leadership, etc.

3

Any NGO campaign that can get the organisational issues addressed is 90% of the way to being successful at e-campaigning.

Obama's campaign versus his competitors is simply one of most recent and dramatic examples.

Contact Duane to:
- Discuss your interest in eCampaigning training, advice or support
- Explore what is the right mix of services for you
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Further Reading and Viewing

This article has been in draft since 2008. In that time countless
- articles about the Obama campaign have been read,
- presentations have been watched,
- conversations have been had
- thoughts have evolved.

This is a list of some of the source material that has either helped me write this or have confirmed what I already wrote.

Duane Raymond
21 February, 2010

To read more about the overall Obama Campaign and his competitors see:

1. **Barak Obama: How He Did It**, Newsweek, Oct 2008
http://www.newsweek.com/id/167582
2. **How Barack Obama won the US election**, Telegraph, Nov 2008 http://www.telegraph.co.uk/comment/personal-view/3563266/How-Barack-Obama-won-the-US-election.html
3. **Five Reasons Why Obama Won the '08 Election**
http://usliberals.about.com/od/obamavsmccainin08/a/Obama Win.htm
4. **How Barak Obama Won**, BBC news, Nov 2008
http://news.bbc.co.uk/1/hi/world/americas/us_elections_2008/7704360.stm
5. **Tracking Campaign Finance**, BBC News, Oct 2008
http://news.bbc.co.uk/1/hi/world/americas/7596690.stm
6. **Online Tactics for Success**, Jan. 2009
http://www.brainerd.org/downloads/Online_Tactics_and_Success.pdf
7. **Learning from Obama**, Colin Delany, Aug. 2009
http://www.epolitics.com/learning-from-obama/
8. **Is this man the future of politics?** (with video) Guardian, Feb. 2009
http://www.guardian.co.uk/politics/2009/feb/18/thomas-gensemer-online-election-campaign
9. **Near-Flawless Run is Credited in Victory**, New York Times, Nov. 2008
http://www.nytimes.com/2008/11/05/us/politics/05recon.html
10. **The New Organizers, What's really behind Obama's ground game**, Zack Exley, 8 Oct 2008
http://www.huffingtonpost.com/zack-exley/the-new-organizers-part-1_b_132782.html
11. **How Obama Really Did It**, Technology Review, Sep. 2008
http://www.technologyreview.com/web/21222/
12. **Video: Applying Obama Online Lessons to Local Campaigns** (22 Jan 2010)
http://www.epolitics.com/2010/01/22/video-applying-obama-online-lessons-to-local-campaigns/
13. Unread: **The Audacity to Win** by David Plouffe (book), Nov. 2009 http://www.davidplouffe.net/ or read excerpts at
http://www.politico.com/news/stories/1109/28985.html

4   Feedback and Debate

4.1   Undervaluing social networking?

Feedback:
Andrew Davies
23 Feb, 2010

4.1.1 Andrew Davies at 23 Feb, 2010 04:17 AM

Nice read. I like the myths. Of course I think you've got a few bits wrong. Not that I'd actually know. I'm probably going on less info than you have, but I have read the other big evaluations out there.

Anyway, I think you're undervaluing social networking. Why?

Because Obama's team succeeded by using best practices. These are still developing for social networking. By 2012, I expect it will still not be as important as email, but even today it would be pretty foolish not to invest heavily.

Because if you look at the list of benefits you give for being online, many of them are served better via social networks than own website properties or email lists. (1, 2, maybe 3, 4, maybe 7, partly 8, 9)

So while it's important to recognize that email is still king. I don't think it's correct to sideline social networks completely, or assume email will stay king forever.

The Obama team did experiment with new ways of using online tools.

They broke rules and invented new ones. Best example is their long format YouTube videos. The point is that the majority of their efforts went to things with high returns, but they did reserves space for innovation.

Another not so small point - Obama probably would have lost if it hadn't been for the internet. Yeah, I know that's a bit bold to say. But the low barrier to entry for online recruitment and fundraising gave him the crucial leg up against an opponent who had the traditional party machinery backing her. Sure, there were other critical factors. But it was a very tight race - so I think it's completely safe to say that if online had been taken out of the equation, Obama would have lost.

Like the links to further reading, and like the "Obama's online strategy" section. Could do with less repetition of the general "management level" advice. (It's good and important, and worth

showing boss people, but not meaty for us practitioners. Could do with a few sharper, more actionable points. (Things to consider doing.)

Might be worth re-working the doc so it has sections targeted at "big picture" (organizational decisions) and practical implementation (tactics used, best practices, etc).

Just a thought, not sure about that last bit.

Anyway, looks good overall. Hope you can get it published somewhere fancy. Think it's worth it.

Feedback response:
Duane Raymond
23 Feb, 2010

4.1.2 Duane Raymond at 23 Feb, 2010 07:13 AM

Thanks Andrew - I think you make some great points and I will consider making a 'part 3' covering more of the practices in detail.

4.1.2.1 Social Networking

I think with social networking we all tend to over-estimate it's value because we look at the growth and size and not the user experience.

For instance Facebook has recently overtaken Yahoo in online visitors and Google is getting scared. That's huge. Yet if we look at the way an individual uses Facebook, the ability to get that person's attention and get them to engage is so limited and cumbersome that for most it doesn't happen. Each person has a walled garden which Facebook has built to marginalise non-personal promotion (except their ads).

Each social network is a walled garden built for person-to-person interaction and to repel mass promotion. So for mass campaigning it is very difficult to get a good result for the effort required. This isn't saying they aren't good for other models of e-campaigning, just that for the mass-mobilisation style most organisations do (including the Obama campaign), they seldom deliver.

This is also not saying that as campaigners we shouldn't use them, I think campaigns should and must. They just need to consider and experiment with how they are used. So I disagree when you say "even today it would be pretty foolish not to invest heavily". Invest, yes. Invest heavily, no, not until it is proven to provide benefits that are unique or better than alternatives uses of time and budget. As you say, things are still evolving (and

always will be), but I haven't yet seen the evidence for a 'heavy investment' in using social networks.

I think the benefits of being online ('Being Online Matters...': points 1, 2, maybe 3, 4, maybe 7, partly 8, 9) can all be done with a small but strategic effort, maybe a day or two up-front per social network and then an hour a day to constantly monitor and respond (double for video to edit and upload).

As you point out, the Obama campaign did experiment with social networks, online video, mobile test messages, etc. and did scale up what they found was valuable (primarily video). In my opinion, good campaigning always involves innovation and experimentation. And yes, email is unlikely to be king forever, but I haven't seen anything that will kill it off yet (see this tongue-in-cheek post: http://conversionscientist.com/wordpress/spontaneous/father-of-the-claims-his-social-network-is-the-biggest/

4.1.2.2 Importance of the Internet for the Campaign

I think you make some good points about the impact of the Internet for the campaign, namely that:

a) the 75% of donors gave via the Internet and the half-billion USD fundraising helped the Obama campaign outspend rivals in the last months of the campaign

b) the marginal impact of the Internet activity provided a boost in a tight race to allow him to win

On the finances, the monthly or total fundraising and spending for his campaign (vs. by his campaign) is difficult given that each party and political action committees are also spending. From BBC's 'tracking campaign finance' article (http://news.bbc.co.uk/1/hi/world/americas/7596690.stm) more money seems to have been on his opponent's side for much of the campaign. Yet Obama was still growing in popularity through having a mix of good fortune and good strategy. Furthermore, while 75% of donors gave online, if the online operation had not been so good, I suspect many of those would have given anyway (via phone, post or at events) although at a higher processing cost.

On the marginal impact, human perception tends to be shaped by learning the same things from different sources (hence why limiting sources to one perspective polarises people). The Internet offers a number of additional sources and thus definitely helps. But most people already have a favourite party and the

issue is if they are inspired (or scared) enough to vote. From the reports I've read, the on-the-ground was more critical to this than the Internet. However with the proportion of new voters the highest in decades (youth and previously unregistered voters who tend to be democrat leaning), the youth proportion of that turnout was likely influenced partly by the online activities and would have been one of the factors helping Obama win.

The overall importance of the Internet activities in the campaign lacks evidence either way to prove a case, so all of us are reduced to making judgement calls. I try and inform my judgement call with the limited public evidence from the Obama campaign and my experience with campaigns over the last decade. Based on that, I think mass media influenced people to vote far more than online but online was still important and may have My point at the start of party 1 that the judgement calls of journalists (and our own selective perception bias http://en.wikipedia.org/wiki/Selective_perception) is very poor as they are driven more by the need to report the new or what supports our 'frame' than to report the effective. I'm not immune to that, but have tried to factor it in.

A few articles I found when searching for 'how did Obama win the election' found articles that barely mentioned the Internet:
- Barak Obama: How He Did It
  http://www.newsweek.com/id/167582

- Five Reasons Why Obama Won the '08 Election
  http://usliberals.about.com/[…]/ObamaWin.htm

- How Barack Obama won the US election
  http://www.telegraph.co.uk/[…]/How-Barack-Obama-won-the-US-election.html

4.1.2.3 Other

Some great challenges, and ones I had to do further searching to respond to and ones I think do not have definitive answers too.

Overall I wrote this for managers and campaigners not involved in the day-to-day reality of e-campaigning. Ultimately a lot of the constraints I see on excellent e-campaigning are the organisational issues, not the practices. Putting in this larger perspective hopefully helps non-practitioner stakeholders see what it takes to do it well and how they can help that happen.

4.2 Perceptions of social media impact

4.2.1 Dan at 28 Feb, 2010 08:58 AM

Good to have a solid analysis of the non-mythic Obama campaign to point to.

Just wanted to make an observation about the 'myth' of the Obama campaign (meaning the power of the idea, not necessarily something based on fantasy).

I was struck by the way that myth has simultaneously validated and devalued the power of social media.

i.e.

- even the most recidivist senior manager / ngo exec is now persuaded that social media is powerful because "it's how Obama got elected"

- but by electing a president who seems, over time, to be more status quo than radical challenge, it's removed the hope of practitioners that there was something inherently authentic and levelling about social media.

4.2.2 Duane Raymond at 28 Feb, 2010 09:01 AM

Hi Dan,

Glad you like the article.

> - event the most recidivist senior manager / ngo exec
> is now persuaded that social media is powerful because
> "it's how obama got elected"

I guess it depends what you call 'social media' (since I'd include email and forums but know many people don't) - but if we consider it to be social networks and social sharing system like Twitter or Delicious, then I hope a key point of my post is that social media played a very small real role and only affected journalist/blogger/peer perception. I don't even say the Internet got him elected :-)

..but you are right that people are 'persuaded' that this is true.

> - but by electing a president who seems, over time, to be
> more status quo than radical challenge, it's removed the
> hope of practitioners that there was something inherently
> authentic and levelling about social media.

Being level and authentic have little to do with 'radical challenge' - being " level and authentic" have more to do with the perception of each person and their political leaning :-)

4.2.3 Tony at 1 Mar, 2010 09:34 AM

> just wanted to make an observation about the 'myth'
> of the obama campaign (meaning the power of the idea,
> not necessarily something based on fantasy).
....
> but by electing a president who seems, over time, to
> be more status quo than radical challenge, it's removed
> the hope of practitioners that there was something inherently
> authentic and levelling about social media.

I don't particularly want to veer into politics here (and I write this with more than a little fear that it could easily veer in that direction), but as a largely disinterested observer from afar with absolutely no axe to grind in this particular debate, it seems to me that there is a very powerful counterbalancing myth at work here too (i.e. that of Obama being status quo / ineffective etc), and with the same disclaimer as Dan (I'm not convinced that this myth is entirely based in reality, but that's becoming largely irrelevant in face of the sheer power of the idea itself), I'm curious as to whether (a) this new myth has (as it seems to me) been largely been generated through 'old media', and (b) if so, what that says to the social media debate.

4.2.4 Andrew Davies at 1 Mar, 2010 09:36 AM

I think Dan's point is both more strategic and ideological than political.

It seems to me that many ecampaigners have the idea that the world becomes a better place through more ecampaigning. That is, the more people are engaged in decision making (political, corporate, etc) via social networks and other online channels, the better the world gets.

My impression is that many people in politics and corporate marketing feel the same way. By this thinking, Big Mega Corporation(TM) participating on Twitter makes the world a little better. More dialog with customers, more responsiveness, more accountability.

I took Dan's comment as a challenge to this idea.

Feedback response:
Tony
1 Mar, 2010

Feedback response:
Duane Raymond
1 Mar, 2010

It could be that the same folks who sold us the war on terror, pervasive state surveillance, disposable supersized lifestyles, etc etc, can be as good at using social media for manipulating the masses as they are at using advertising and traditional marketing. It might even be more cost effective.

No doubt, there are some folks on this list who think about this stuff a lot more than I do. There are certainly folks actively working to bolster institutions that make the web more democratic and populous.

Feedback response:
Tony
1 Mar, 2010

4.2.5 Tony at Mar 01, 2010 09:39 AM

> I think Dan's point is both more strategic and ideological
> than political.

Oh, absolutely. I didn't mean it in that way at all. I'm just riffing off it by pondering aloud what role the follow-up myth might also play in the wider discussion.

> It seems to me that many ecampaigners have the idea that
> the world becomes a better place through more ecampaigning.
> That is, the more people are engaged in decision making
> (political, corporate, etc) via social networks and other
> online channels, the better the world gets.

I think it's crucially important to distinguish between participation in an electoral campaign, and participation (in whatever form) in the actual decision making. There's a world of difference between getting someone elected, and in making sure the things that you actually want to happen as a result, do so. Many people seemed to think that the first was enough, but that lack of understanding of the nature of presidential power (or, really, of the nature of policial life, or reality at large), doesn't really have much to say about the power of engaging people in the nitty-gritty of every day political or civic reality, for which ecampaigning is still very much in its infancy.

More e-campaigning resources:

1. **Join the eCampaigning Forum Network** where almost 1,000 campaigning and e-campaigning practitioners discuss and share online about campaigning and e-campaigning. See http://fairsay.com/ecflist

2. **The 2009 eCampaigning Review** is a three-part **benchmarking project** that features an analysis of 55 organisations' e-campaigning data, the survey results of 45 organisations' e-campaigning practices and a review of 84 online campaigning actions. See the 2009 report at http://fairsay.com/ecr09

3. **Learn Campaigning Insights** with FairSay's growing collection of articles, videos, podcasts and research on campaigning and e-campaigning. See http://fairsay.com/insights

4. **Read the FairSay Blog** for e-campaigning ideas, trends and good examples. See http://fairsay.com/blog Recent articles include:
   a. How is public perception influenced?
   b. Split-Testing: Are yours statistically valid?
   c. Benchmarking: What is it?
   d. 64ForSuu.org: Launching a New Campaign in 6 Days
   e. Funding eCampaigning in Kenya
   f. What will help YOU through 2009?
   g. Planning for Success: Change.gov
   h. Obama's Win and the Power of Networking
   i. Donating IS a campaigning action
   j. Behind the scenes of the redesign
   k. Top Four Essentials of eCampaigning
   l. Key Campaigning Gaps in 2006

5. **Get the FairSay Newsletter** with opportunities, content updates and other timely updates on e-campaigning. http://fairsay.com