

Web Advocacy Training for Campaigners

Calendaring Campaigns

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Learning Goals

- ▶ Define “Campaign Calendar”
- ▶ Discuss “Calendar Process”
- ▶ Consider role of “support content”
- ▶ Understand the need to adapt schedule
- ▶ Review a sample campaign calendar
- ▶ Distinguish range of engagement cycles
- ▶ Learn pre-send and post-send time lines

Campaign Calendar

▶ “Campaign Calendar”

- A scheduled set of dates with planned email messages, online actions and other engagements that you maintain across a campaign

▶ Calendars allow you to

- Sustain consistent messaging
- Avoid list fatigue
- Coordinate internal processes and projects

Calendaring Process

- ▶ Define the role that email will play in your messaging and mobilization strategies
- ▶ Characterize your email campaign calendar as a story that spans your timeline:
 - *"We'll do general education 3 months out, get supporters focused with online actions 2 months out, then pump up email delivery frequency in the 4 weeks leading up to mobilization date"*
- ▶ Know your message arc
 - How are you educating and moving your base towards action?

Calendaring Process

- ▶ Message calendaring is the art of scheduling the known together with the unknown
 - Create initial calendar, then evolve over time
- ▶ Establish a pace
 - How often will you hit your list?
- ▶ When will you escalate delivery rate?
 - Lead-up and follow-up around events
 - When is the finish line? Is there one?

Calendar Process

- ▶ Who manages the calendar?
 - What is the role and responsibilities?
 - Are they empowered to resolve the following...
- ▶ What is the process for
 - Adding messages to the calendar?
 - How do you resolve conflicts; what gets bumped?
 - Balancing campaign goals with list fatigue?
 - Storing and tracking calendar milestones?

Building the Calendar

- ▶ Identify known events and milestones
 - What are fixed dates you know you'll message?
- ▶ Slot in support content to complement pace
 - These message dates are subject to change
- ▶ Identify list segments for “micro-targeting”
 - Messages to segments impact larger calendar
- ▶ Evolve the calendar as campaign develops
 - Remain flexible, adapt to feedback & results

Evolving the Calendar

- ▶ You can't know the future when you calendar
 - Your calendar must be adaptable
- ▶ Be ready to respond to:
 - New developments in campaign
 - Shift in organizational priorities
 - Current events: tie breaking news to campaign
- ▶ Calendar changes must be transparent
 - All stakeholders need to know what and why

“Support” Content

- ▶ Support content is used for messaging during “down times” or lulls in the campaign
- ▶ Education pieces
 - About your issue, your target(s), your other work
- ▶ Non-tactical online engagements
 - Sign a petition, take a survey, spread the word
- ▶ Shout-outs for allies and related causes
- ▶ Donation appeals

Sample Campaign Calendar

- ▶ **Example: Messaging arc for a mobilization**
 - 5-month cycle for national day of action against corporate target
 - Key milestones include identifying target, launching campaign, launching sign-on letter and publishing it, and a national day of action
 - Engagement cycles for action takers, letter signers, donors, event hosts and participants

Sample Campaign Calendar

Campaign Milestone	Messages to send	Send Date	Micro-cycles
Campaign Target Select	Target list Survey	5 month out	
Target announcement	Announcement talking points Online action to target	4.5 months out 4 months out	Action cycle
	Education – viral activity Sign-on letter announcement	3.5 months out 3 months out	Sign-on cycle
Launch sign-on-letter	Sponsor ad-buy	2.5 months out	Funder cycle
	Announce day of action Launch ad buy	8 weeks out 6 weeks out	
Ad buy with letter	Video about target – viral Update on day of action	4 weeks out 2 weeks out	Host cycle Participant cycle
	Day of action lead-in with donor appeal DOA reminder	1 week out 1-2 days before	
National day of action	Follow up on DOA Donation appeal	Day after Day after	

Engagement Cycles

- ▶ When people engage online, reciprocate with an online engagement cycle
- ▶ Possible cycles include:
 - Online Take-Action cycle
 - Email Sign-On cycle
 - Donation cycle
 - Day-of-Action Event Host and Participant cycles

Engagement Cycles

- ▶ Online Take Action cycle
 - Thank you
 - Report-back on results
 - Invite to National Day of Action
- ▶ All messages should have
 - Tell-a-friend
 - How to donate

Engagement Cycles

► Email Sign-On Cycle

- Welcome
 - Thank you with information about organization and expectations about what they'll be receiving
 - Donate ask
 - Link to profile
 - Link to unsubscribe
- Follow up with campaign overview, education, background, and engagement opportunities

Engagement Cycles

► Donation Cycle

- Thank you message
 - Tell a friend
- If donation was for campaign or project, follow up on outcomes
- Plan subsequent money asks – always an art
- Don't harass or over-mail

Engagement Cycles

► Day of Action Event Host cycle

- Welcome them
 - Information about action
 - Link to online resource center
 - Let them know about time lines.
 - If they're using administrative tools, provide login
 - Tell-a-friend link for their particular event

Engagement Cycles

► Day of Action Event Host cycle

- Subsequent messages should
 - Educate hosts about tools they can use
 - Invite them to conference calls & other collaborations
 - Instruct how to report on the event
 - Send day-before and other timely reminders
 - Send reminder after action to do report
 - Send them a summary of everything that happened

Engagement Cycles

- ▶ Day of Action Event Participant cycle
 - Welcome them
 - Information about action including location/directions
 - Have a donation ask
 - Tell-a-friend link for their particular event
 - Send event reminder day-before or day-of
 - Send action follow-up to summarize outcomes and highlights

Blast Pre-Send Time Line

- ▶ If a message is going out on date X, what needs to be ready when?
 - Message development: Content authored
 - Template selected/designed
 - Images and other media assets ready to go
 - Click-through page and content ready to go
 - Integration of all the above to be blast-ready
 - Testing, testing, testing...Blast!

Blast Pre-Send Time Line

- ▶ Sample Timeline for scheduled blast (YMMV)
 - Content authored: 7-14 days out
 - Template selected/designed: 5-7 days out
 - Images and other media assets: 4-5 days out
 - Click-through page and content: 3 days out
 - Integration: 2 days out
 - Testing, testing, testing: day before
 - Blast!

Blast Post-Send Time Line

- ▶ Verify blast processed by mailing host
- ▶ Check replies: immediately and always
- ▶ Check open/clickthru rates after 12-24 hours
- ▶ Check unsub count on list after 1-3 days
- ▶ Assess effectiveness of blast after 2-4 days
- ▶ Adjust future calendar items based on results and learnings

Section Summary

- Campaign Calendar gives pace and structure to campaigns
- Calendar Process makes for sustainable calendars and campaigns
- Enhance with “support content”
- Adapt schedule as campaign evolves
- Know the range of engagement cycles
- Follow pre-send and post-send time lines

End Of Section

- ▶ Questions?
- ▶ Comments?

Thank You!

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