

Digital Tools for Nonprofits

By Ellen S. Alberding

The Presidential elections of 2008 and 2012 famously established new standards for how social and digital media could be used to identify supporters and motivate them to act. A cadre of young digital sophisticates borrowed ideas from the corporate world, and from new forms of social interaction, and applied their own keen insights to reinvent the meaning of voter engagement and public participation in the political process.

The Joyce Foundation was interested in how digital media and technology were changing the work of the nonprofits we supported. As a non-partisan foundation dedicated to improving the quality of life in the Great Lakes region, we wanted to understand how the lessons from a watershed presidential campaign cycle could apply to the urgent public policy focus of our grantees. How could online advertising help organizations advocating for stronger policies to reduce the deadly toll of gun violence? How could email marketing further the work of groups dedicated to improving teacher quality in Illinois, Indiana, and Minnesota? And, what could be the role of social media in facilitating a public dialogue about protecting the water quality of our Great Lakes?

What we found was a tale of two cities. Many large nonprofits were adapting quickly, and thriving. But most small nonprofits had little or no digital presence, and were being left behind.

We asked two of the nation's top political digital strategists to translate their experience to the nonprofit world. **Patrick Ruffini and Michael Slaby have worked for candidates on both sides of the aisle, and represent the best-in-class practitioners in digital media and technology. In the following essays, they share their recommendations for how nonprofits can advance social and policy change in a world that is being disrupted by digital change.**

Everyone knows that digital media and technology have transformed public engagement. According to an August 2012 Pew Internet and American Life survey, 81% of Americans use the Internet, with 69% of Americans using social media sites like Facebook or Twitter. Another October 2012 Pew study found that 66% of social media users – or 39% of American adults – have used social media to participate in civic, political, or policy engagement activities. Perhaps the most large-scale examples of this phenomenon are political campaigns. In the 2012 election, political campaigns used digital media and technology to raise hundreds of millions of dollars and attract tens of millions of activists, providing them with concrete ways to engage in the political process.

Nonprofits are, of course, very different from campaigns. For one thing, many of the groups we work with operate on much more meager budgets. According to the National Council of Nonprofits, over 80% of nonprofits have annual expenses of less than \$1 million; in the heat of an electoral race, political campaigns can spend \$1 million in a single day. And nonprofits don't often have a prominent headliner to generate a fan following easily.

Still, there are strong parallels. In their daily work of public education and direct services, nonprofits must identify new sources of volunteers, engage their existing base of activists, and fundraise around mission-driven goals. **So we wondered: how can these tools benefit the incredible work done by nonprofits every day?**

After consulting an array of experts, we developed a better understanding of the problem: our grantees lacked three basic things needed for using new media well – training, tools, and talent. In response, we made grants to help organizations develop these capacities. For example:

Training: Many of the nonprofits we support could benefit from a crash course in how to write a persuasive email or how to use Twitter effectively. Moreover, many are unaware of how to use online advertisements or how to establish relationships with bloggers. In partnership with the New Organizing Institute, the nation's top training organization of online and offline organizers and community managers, we supported digital training opportunities for over 50 staff members from our grantee groups. The trainings included both basic and advanced courses about how to use a new generation of online tools to advance policy education goals.

Tools: We learned from national organizations like the Natural Resources Defense Council that online advertising was a major driver of the growth of organizational email lists and social media followers. So, we made grants to nonprofits to underwrite the costs of using Facebook or Google advertisements to persuade and acquire new supporters. For example, one of our grantees grew its email list by over 400 percent, with much of the growth originating from smart, targeted online advertising.

Talent: Last year, the Obama and Romney campaigns each employed over 100 staff members dedicated to digital campaigning. In larger organizations like the American Enterprise Institute or the Human Rights Campaign, there are entire departments and positions devoted solely to digital outreach and engagement. We set out to support these positions within the nonprofits we funded. For example, in one instance, we found a talented staff member internally and supported the development of her digital skills; in another instance, we funded a newly created "Digital Manager" position to oversee an online communications campaign.

The reality is that foundations have a major role to play in helping the nonprofit sector adapt to the digital revolution. We can take the long view and identify points of intersection across disciplines. We can invest in new ideas and withstand the failure inherent in iterating toward innovation. And, we have a useful role in convening the best experts available to identify challenges and propose solutions.

It is in this spirit that we introduce the following two essays. We hope their experience offers lessons to help you do your work better.

Ellen Alberding is president of the Joyce Foundation, which makes grants of \$40 million a year for projects to improve the quality of life in the Great Lakes region. Foundation priorities include enhancing educational outcomes for low-income children; employment and workforce development; gun violence prevention; and an environmental focus on energy efficiency and water quality. She is Vice Chair of the City Colleges of Chicago, and serves on the board of other several other organizations, including Advance Illinois, Independent Sector, and the National Parks Foundation. She holds an honors degree in English from Brown University and an MBA from Northwestern University.



Credit: Patrick Ruffini/Engage

Do What You're Already Doing – Better

By Patrick Ruffini As advocates, we now have a dizzying array of online tools at our disposal, as demonstrated spectacularly in the 2012 presidential campaign. While that example can be instructive for nonprofits, it can also be daunting. Both the Obama and Romney campaigns raised hundreds of millions of dollars online (two thirds of the Obama campaign's total fundraising, or \$690 million, came via the Internet). Both dedicated hundreds of staff to online fundraising, social media, technology, data analytics, design, video and photography, advertising, online communications and rapid response, and digital organizing. Effective nonprofit operations will need to do most or all of these things on a shoestring budget.

Nonprofits, like political campaigns, must constantly be informing, mobilizing, and fundraising. Rather than treating digital as something new, you should think of it as a force multiplier that enables you to do the things you already do, better. Without the luxury to build out huge digital teams, small groups will need to integrate digital into every aspect of the operation. The person who talks to the press will also be blogging and tweeting; the lines between digital and non-digital will continue to blur as digital skills become essential for those hired into “traditional” roles.

As our lives and those of our supporters go online, no organization will be exempt from the shift. All will have to think about how to reach existing supporters in an increasingly fragmented media environment, and how to tap into the opportunity digital gives us to reach new audiences. Over the last several years, I've worked to apply lessons learned at the national level to organizations of all shapes and sizes. Here are some of the principles I've found it helpful to keep in mind.

1. Understand (and quantify) the ladder of engagement.

Organizations constantly strive to nudge their supporters up the ladder of engagement – moving e-mail list members to volunteers, and volunteers to donors. Today, they must learn what to make of the newest rung – social media – and figure out how to move its participants up to higher levels of engagement.

Social media can be hard to quantify. What do all those “likes” on Facebook or views on a YouTube video mean, if they don't lead directly to a donation? The nonprofit community has coined a new term for those who will gladly sign a Change.org petition or share a Facebook post but won't take meaningful offline action: “slacktivists.”

Slacktivism is a function of the fact that it's easier than ever to start engaging with a cause. Twenty years ago, you had to be on a mailing list or have a volunteer knock on your door to get involved; the vast majority of people never got the opportunity. The web made it dramatically easier to find causes you're interested in and instantly sign on. Organizations, impressed by the influx of early interest, think that should automatically translate into a swell of new donors and volunteers. They pick up new supporters on social media much faster than on e-mail, only to see many fewer of them convert as donors. Organizations need to be persistent, patiently cultivate relationships, and make it easy for people to take the next step.

We are approaching this problem statistically. Working at the Republican National Committee, and later in the software we designed at our agency, we worked to quantify positions on the ladder of engagement by assigning scores to each online activity. Opening an e-mail might be worth one point, a click through might be worth three, a “like” on Facebook five, a donation fifty, and so on. This allowed us to approach each person with customized communication directing them to the next rung up the ladder.

Organizations should see social media for what it is, the first rung on the ladder. People don't jump immediately from the lowest rung to the highest. Organizations have found success by treating e-mail list sign-ups and petitions as a necessary intermediate step between social media and fundraising. One group with hundreds of thousands of followers routinely posts petitions supported by images to their social media accounts. Once a person has signed, they are skipped to a donation page tied to a petition. The organization has raised more than \$300,000 in annual revenue this way.

Having the right database and measurement tools will help illuminate this process. Too many organizations invest in database solutions centered exclusively around fundraising needs, which don't allow for much analysis of online objectives, like matching an e-mail address to a Facebook profile to count the number of times the owner has "liked" your content. You can also tie together activity on other social networks like Twitter, e-mail opens, web form submissions, and donations.

When it comes to assessing who will become a donor, the person's past behavior is often more important than their stated preferences. Fundraising asks driven by data about past activity are especially powerful. E-mails that cite earlier donation amounts and ask users to double down their support have boosted giving many times over, as have those that target non-donating "slackers" by citing their lack of previous action.

Having the right data and analytic tools is the essential foundation of an effective program to move people up the ladder and turn slacktivists into activists.

2. Ask people clearly and concisely what you want them to do.

Knowing that each e-mail or website visit may be one of the few chances you have to reach someone, it can be tempting to cram in as much detail as possible and hope they soak it all up. This is almost always the wrong instinct. It's the reason many organizational websites are overly cluttered and e-mail communications cover multiple topics with no clear "ask."

When you want supporters to take action, be extremely clear and upfront. Don't bury your call to action in a sea of secondary and tertiary policy points. Most presidential campaign e-mails sent this year contained no more than a few short paragraphs. Generally, the longer it takes for supporters to wade through extraneous content, the less likely they are to act.

This applies to websites, too. Splash pages, which typically prompt users to sign on to your organization before reaching your site, can grow your e-mail list many times faster than a small e-mail signup box buried on your homepage. If you really want your supporters to do something, it needs to catch their eye immediately.

This is why visual content, combined with clear calls to action, is so important on the social web: people can process it in a split second. For a conservative group targeting the youth vote in 2012, we tested numerous combinations of content and calls to action to maximize liking and sharing on Facebook. Visual content won the day: videos saw a 505 percent lift in sharing over links to other stories, and graphics saw a 367 percent lift. And we found that, far and away, the best way to get people to share something was to ask them to share it.

Win the Social Web

- > Watch what people Like and Share online
- > Use visual content like graphics and videos
- > Test different combinations to get the best performing outcome
- > Ask your supporters to share what you put out

You can apply the same focus on simple communications to your website, where most of the action you care about will happen. Breaking the engagement process into a series of sequential steps is a far better strategy than presenting everything to everyone all at once. At our agency, we've experimented with two different approaches. One presented users with a menu of activities: signing a petition, making a pledge, sharing on Facebook, or donating. The other, leveraging game mechanics and the concept of "leveling up," displayed one action at a time, patterned after the rungs of the engagement ladder. Many more people did everything that was asked of them when we presented it to them in sequenced, bite-sized increments. A buffet with too many dishes can overwhelm and confuse, but it's easy for people to sign on for just one more thing.

As the Internet's capacity to distract grows and our lives become busier and more complicated, make sure you are delivering clear, concise, and highly visual calls to action.

3. Test everything.

Perhaps you've been doing digital or direct marketing for a long time and have a gut sense of what works. Direct marketing professionals have long preached the value of testing, but it takes discipline to actually do it time and again and then integrate the learnings into your program. Digital marketing dramatically eases the process. Particularly since digital best practices are often not as well articulated as their offline counterparts, it is incumbent upon all organizations to test and re-test their assumptions and to remain agnostic between different methods until a proven winner emerges.

In the last campaign, both campaigns tested multiple variations of outbound e-mails. The Obama campaign deployed as many as 18 test versions per e-mail, each combining three or four variations each of subject lines and copy. Performance could vary by as much as 80 percent between versions. Though it's tempting to believe that a human being could have predicted the results, or at least come closer over time, a senior member of the team reported that no one could reliably predict the winner. "We basically found our guts were worthless," they confessed in a debriefing session after the election.

Sending 18 different test e-mails is an option only for a handful of groups with millions of members. But low-cost testing tools allow you to create simple tests, on e-mail and beyond. Optimizely offers a simple script you can install on your registration forms or petitions that allows a non-technical person to test page layouts, button colors, or call-to-action copy. Online advertising can be rigorously tested, with self-serve advertising platforms like Google AdWords or Facebook allowing for real-time optimization and rotation of creative material. Most mass e-mailers also offer an A/B testing module that allows for a "champion" version to be sent to the rest of the list. Groups of all sizes can see dramatic improvements by running A/B tests across all their digital properties.

A few rules of thumb: First, vary only one thing at a time so you can isolate the variable that increased performance. Second, run your test long enough to get valid data, preferably over thousands of views on a piece of content. Third, don't

mix and match the winners of different tests on a single page without testing the combination, since the elements can interact with unintended effects. Finally, periodically re-test, as the novelty of a tactic can wear off.

Test Everything

- > Vary one thing at a time
- > Give your test time to get the best results
- > Test the combination of best performing elements
- > Periodically retest to keep your content fresh and engaging

4. What works offline will probably work online.

In a small nonprofit, every staffer is to some degree responsible for digital integration, and frequently staff with significant offline experience have responsibility for the digital program. That can be a strength, because quite often the lessons of offline organizing and marketing translate well to the online world.

Human behavior is human behavior; it does not change whether one is online or off. Technology can foster real-time, two-way dialogue – something we wish we could do more offline – but people's underlying desire to participate doesn't change just because they're online. When building an online program, think of things that have worked well for you offline and seek ways of applying them online.

In this last election cycle campaigns found that contests featuring dinner with President Obama and Governor Romney were extremely effective in getting people to donate. This is essentially the same insight that drives the success of high-dollar fundraising events, the ones that candidates spend an inordinate amount of time attending. These contests work because they offer a benefit, rather than simply describing the positive features of the candidate. This old-school lesson works just as well in new online marketing.

The science of human behavior offers insights for understanding political and cause-based mobilization. For example, people want to feel that they are part of something big, and that they won't be alone if they take action. That insight has led campaigns to change how we talk about voting: we no longer emphasize the potential for low turnout ("Your vote could really decide things!"); instead we stress high turnout ("Everyone is doing it!"). The notion of civic participation as a popular social act inspires more people to want to participate.

Finally, integrate your offline and online programs. Many nonprofits still focus on direct mail, which is fruitful but expensive. To identify the most effective pieces, you can feature a unique web address on each mailing and then check the overall performance of that campaign. Or you can combine different media to reinforce appeals, sending out e-mail reminders asking people to check their mailbox or making phone calls to drive responses to e-mails. Finally, many people find it more convenient to give online. The Obama campaign saw a double-digit performance increase by making their contribution page load more quickly; anything you do to make the process faster and more convenient will likely yield measurable results.

5. Communicate consciously.

Often the best way to start a conversation online is by listening. This approach is helpful with anyone from the closest circle of activists to the broader online community.

In communicating with your base on e-mail and social media, think of yourself as engaging in a conversation. The tone must be consistent, and supporters should leave the interaction feeling involved, valued, and listened to. Show personality in your writing and build characters around the people who are communicating. Be sure to listen and find opportunities to share the best stories and content from the grassroots.

Engaging social media, you can quickly get a sense of what works and what doesn't. Pay attention to content that gets shared widely, even if it's outside your field of interest. **Note the humor, visual content, "memes," and content with strong emotional or logical appeal. Staying attuned to what people respond to on the Internet can help you act quickly and effectively when the opportunity arises.**

Speed is essential. Conversation, particularly on Twitter, moves fast; delay means a lost opportunity to enter the conversation. For one group, we created a vast amount of shareable image-based content for Facebook and other social media. We had designers churning out highly polished images daily. Yet some of our greatest hits were also the most visceral: the "meme" type graphics spun up in five minutes with applause lines from the Republican convention slapped atop a stock image. It turns out that our audience just then cared more about authenticity than about production values. To ensure you can respond to fast-moving events, the person who posts to your social media needs to be trusted, capture the voice of the organization, and be empowered to respond at a moment's notice.

Also remember that social platforms vary in what they can do. In general, Facebook will reach around four times as many users as Twitter here in the U.S. But Twitter provides opportunities for real-time dialogue and co-creating content, including retweeting and more interactive forms. As part of our work with young voters in 2012, we took slogans provided to us by people on Facebook and Twitter and mocked them up in graphic form. For the most part, these interactions were not pre-planned: we saw something that just clicked, and jumped on it. While you are well served by meticulously planning out the different elements of your online program, always keep a certain amount of flexibility, as the most successful content can often be the most visceral, spontaneous – and unexpected.

Conclusion: Relationships matter.

Digital often gets described in terms of "technology" and "tools." At a tactical level, this might be fine, but it does a disservice if it places digital in the realm of the elusive data geek or "ninja" who must decode it all for us. In a sense, the only true "digital director" today is the organization's leader. Digital integration is no longer a side project, but core to every function. Staffing and budget are important; even more important is the recognition that digital serves a larger purpose guided by an organization's core values. For the organization to succeed online, people at the top must take a deep interest in digital, constantly challenging their teams to do better.

The focus must be on the human side of the Internet, something all of us are part of, and that we all use to create and strengthen relationships. The key to understanding the Internet is understanding the importance of relationships. This is not the province of digital specialists, but something within reach of us all.

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Embrace the Change

By Michael Slaby Obama for America changed the landscape of national political campaigns. In 2008, we elevated digital thinking to be a central strategic pillar of the organization but did not have the time or resources to build much of our own technology. In 2012, we fully embraced the ubiquity of Facebook and power of Twitter, and with more time and capacity than in 2008, we set out to engineer our own solutions to problems that had plagued earlier campaigns.

Looking back on both campaigns, however, it's clear that the most important shift was the decision to integrate digital and technology comprehensively into our operation rather than letting them sit as separate departments cut off from the strategic process of the campaign as they had lived in the past. In a world where media and technology are shifting and converging so quickly we can barely keep up, integrating digital and technology with communications, program operations, and fundraising in particular was utterly essential. This increased integration with the media and technology landscape around us forced us to be more integrated internally, to be more thoughtful about our goals and needs, and to knit digital programs and technology platforms more closely to campaign outcomes.

But for smaller organizations and non-profits hoping to embrace digital and technology the way we did, wading through the mythology around the campaigns can be overwhelming. After helping to build the Obama teams, I now spend much of my time helping organizations – from the small but amazing to the global and extraordinary – do just that: use digital and technology as a force multiplier to expand their reach and to make their programs more efficient and more effective. Here are five innovations that all organizations can explore to help them move forward.

1. Let Tech People Solve Tech Problems

The first key to digital and technology innovation isn't about either digital media or some new technology. Getting these things right is fundamentally about getting the right people in the right positions to solve essential organizational challenges. In organizations that are not technology-based (in other words most organizations), leaders often figure out what they need on their own before telling the technology team to make it happen, rather than including them in the strategic process of defining the problem. It is a much better approach to involve your tech team in a conversation that starts, "we need to figure out how to make our events more effective tools for getting new people into the organization" than to task them to "create a new online event system that does x, y, and z." And this is just as true for a five person nonprofit as it was for the teams of hundreds we had working together on the campaigns.

Technologists and professional digital strategists think differently about problems than other members of the team and that perspective is incredibly valuable. We must have enough humility and trust to empower everyone in our team to do what he/she is best at. Including more people in the early stages of new challenges is much more productive than turning to them late in the process to resolve unforeseen problems. Start looking for solutions with big teams that include a broad set of perspectives and then pare down to a more nimble execution team – not the other way around.

2. Test Everything

Your mission and organization are unique. Your community is unique – what works in one community will not necessarily work in another. **The only way to be certain about what drives your community is to test and measure what you do and make sure to learn from what works and what doesn't by listening to data over anecdote.**

There are all kinds of optimizations that were important for the campaign that might make no difference for you. We even found things that shifted from 2008 to 2012 – like the most effective color for the donate button on the homepage. In 2008, our exhaustive optimization of the donation process led us to color the button red. In 2012, when we went through the optimization process again, we found that white worked better. Think of the thousands of donation opportunities we could have missed if we had been lazy and assumed that what had worked before would work again.

In working with a rapidly growing education organization that had deployed some direct learnings from our 2008 campaign, we discovered that mimicking those early successes was completely ineffective – new tests revealed wholly different best practices. The lesson: you may think you know your people and what will work with them, but how do you know? Most of our assumed “understanding” of our own organization derives from anecdotes that have festered into facts. Test and validate your assumptions.

3. The Second Circle

With 35 million Facebook fans and 26 million Twitter followers, the President has unprecedented capacity to reach and activate people via social media. But campaigns and advocacy organizations cannot let social media just be about preaching to and reactivating the choir. We realized early in the campaign that those millions are connected to nearly the entire voting age population of the United States. Empowering the President’s fans and followers to effectively engage that second circle – the people they are connected to across the country but that we were not – was essential to growing our community beyond our committed base.

Most organizations still view Facebook and Twitter as media channels similar to their websites – another way to deliver messages and content to supporters. And while this is a good starting point, social media networks were designed as relationship platforms, not just content-delivery mechanisms. The most effective organizations recognize them as engagement opportunities for the activation of communities.

We built an entire platform around this principle called Targeted Sharing. It allowed us to connect our Facebook fans with people in their networks in more effective ways than just random sharing. Everything from helping fans reach their unregistered friends to just connecting with friends in battleground states made them more effective advocates for the campaign.

Few smaller organizations will be able to invest in the engineering and data resources for such applications. But just thinking of supporters as part of your organization who must be empowered to reach into their own networks is a great first step. This can be as simple as clearly articulating the need to reach new communities, or finding ways to incentivize recruitment. The goal is push the responsibility for growing your community down to the people who already support you.

4. Mobility First

You don’t know and can’t control where and when people will read, watch, or engage with you. By the end of the 2012 campaign, around 40% of our web traffic across all of our properties came in from mobile and tablet devices. This signifies an important shift in how and where people are consuming information, and you need to design programs and content that work for them.

When most organizations think about mobile, they immediately start into a discussion of SMS or smartphone apps. While these can be important parts of your outreach and engagement, mobile strategy starts well-before mobile-specific platforms. A great first step is to embrace the principles of “responsive design,” making your site friendly to read and navigate via smartphones and tablets of all sizes. Then make sure your most important engagement points like your signup and donation processes are optimized for mobile devices. Forms like these are notoriously tough experiences on smartphones, so enabling efficient ways to speed up data gathering is important. It is also an opportunity to encourage people to pre-fill forms by connecting their Facebook profile.

Think Mobile

- > Make your website friendly to read and navigate on smartphones and tablets
- > Pay attention to important engagement points – like signup or donation pages – to ensure that they are easy to use on a mobile device

You might choose at some point to develop programs that are mobile-only, like the location-based network being built by a veterans support organization I work with that is entirely focused on a native application experience. But most organizations need to begin by making their existing experiences mobile-friendly. The effectiveness of your programs and fundraising depends on providing people an experience to fit the mechanism they use to engage with you.

5. Big Data in Little Organizations

The entire world seems obsessed with the possibilities unlocked by big data and analytics. Fundamentally, big data is about taking advantage of advances in computing technology that make processing large amounts of data easier, faster, and cheaper. It is often presented as a magic ingredient that will revolutionize everything about an organization. It may in fact revolutionize your organization but that revolution is likely to be more cultural than technological.

Inside the campaign, we had a huge analytics team responsible not only for things like electoral strategy and our internal polling program but also for inspecting the programs across the campaign in order to learn where we needed more effective or more efficient options. Compared to the work of most nonprofits, we had a simple task: our outcome was binary (we win or lose the election) and the units of measurement (votes) were well-understood and not under debate. That clarity and focus made evaluating programs simple (“How does this help us win? How does this get us more votes?”). But we still had to measure and create meaningful connections between programmatic metrics like calls made per team per weekend and dollars raised per email to our overall goal.

Quantifying audience and potential impact is an important first step to assessing and prioritizing programs. Some of our first conversations with a small cancer organization were dominated by the question “how do you know?” How do they know whether their programs are working? How many people are potentially affected by these diseases? How many have heard of their work? Starting big with basic census-level data about how many people might be in our target audience was an important step to putting their work in context and giving them a sense for how much impact they are having.

Being willing to ask probing, difficult questions about what is really working versus what just feels good is often a tough shift for organizations that are used to running on instinct and anecdote.

Embracing self-critique and listening to the data is often the most important cultural shift available to small teams who lack the people and resources for ambitious big data projects. Take the time to understand what success means for your organization. Define quantifiable metrics that represent real success and connect your programs to your end goal. This exercise is powerful, even if you never take on something like creating a real-time measurement and reporting engine.

Make Big Data Work for You

- > Be willing to ask tough questions about what's really working, and listen to the data
- > Define success, using metrics to connect your programs to your end goal
- > Avoid adopting platforms or social media services just because they're new; evaluate whether they can really help your organization and whether your community is using them

An important corollary to defining success is doing only what matters. We always have more ideas and ambition than we have hours in the day or resources to apply, so we need to be extremely critical about using those resources to greatest impact. When it comes to digital and technology programs, “shiny object syndrome” is your worst enemy. Do not embrace platforms or social media services just because they are new and flying high on the tech blogs. Evaluate carefully whether they can help drive your organization and whether your community members (or potential new members) are currently taking advantage of them. It is important to try new things – but intentionally and with purpose.

Conclusion: Leadership Matters

In 2008, the Obama Campaign was primarily an opportunistic consumer of technology. In 2012, with the gifts of time and perspective, we built a team capable of engineering solutions to long-standing challenges in campaigns. We gave this team real and meaningful intelligence about our past experiences, but equally important we empowered them to think broadly about the challenges we faced. That balance between institutional awareness and new ways of thinking can be tricky, but it is important to get it right. This idea leads me to my last and overarching conclusion: **leadership is extremely important.**

Embracing and empowering technology in general, and analytics in particular, requires commitment and focus from the top. The cultural shifts that come from engaging in technology are disruptive. That disruption can be a good thing – a powerful force for reimagining what is possible and becoming the best version of ourselves. Or it can trigger destructive conflict that drains the team of energy and trust. Which one it is depends entirely on organizational culture and leadership. The Obama campaigns were led by campaign managers who understood that new ideas are necessary to win new campaigns in new eras. Similarly, non-profits need leaders willing to find the talent or develop the skills they need for the challenges and opportunities that are coming, not for those that have already passed.

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Ten Key Takeaways

- 1 Integrate digital media and technology into every aspect of your organization:** As our lives and those of our supporters go online, no organization will be exempt from the shift. All communications, program operations, and fundraising should include a digital focus.
- 2 Leaders must embrace digital:** The most important “digital director” is the organization’s leader. For organizations to embrace digital media and technology effectively, they must have commitment and focus from the top, including leaders who take a deep interest in digital, constantly challenging teams to do better.
- 3 Design online programs based on offline behaviors:** Human behavior is human behavior, whether you are working online or off. People—and their needs, desires, and motivations—are the starting point for any successful program. When building an online program, think of things that have worked well for you offline, and seek ways to apply them online.
- 4 Empower supporters to take the next step:** The ability to “like” a Facebook post or sign a petition is an important first step, but you need to make it easy for people to take the next step. Find ways to incentivize and empower your existing supporters to reach into their networks and get the message out to a second circle of activists that can grow your community. Think about online and offline engagement as a ladder, and ask supporters to start with small steps that grow into bigger actions.
- 5 Listen and respond to your fans:** Have a conversation with your supporters. Keep track of what they respond to and what is shared widely. Speed also is essential. Conversation, particularly on Twitter, moves fast; any delay is a lost opportunity to enter the conversation.
- 6 If you want online activism – ask for it:** When you want supporters to take action, be extremely clear and upfront. Emails should not bury a call-to-action, and neither should websites. The best way consistently to get people to share something on social media is to ask them to share it.
- 7 Test everything:** Your community is unique; what works for one community will not necessarily work in another. Low-cost testing tools exist that allow you to create simple tests—for email, online advertising, and beyond. Be sure to only vary one thing at a time when you test, run each test long enough to get valid data, and re-test periodically. Finally, take the time to understand what success means for your organization, and define quantifiable metrics that connect your program to your end goal.
- 8 Let technology people solve technology challenges:** Leadership often takes half-baked solutions to technology team members, rather than including them from the beginning. Organizations should start looking for solutions with big teams that include a broad set of perspectives, and then pare down to a more nimble execution team—not the other way around.
- 9 Always think mobile:** Around 40 percent of the Obama campaign’s website traffic came from mobile and tablet devices. Optimize your website and online content for mobile devices. The best way to do this is to embrace the principles of responsive design.
- 10 Use resources wisely and avoid shiny objects:** Every organization is resource-constrained, so use your resources to their greatest impact. Do not embrace technologies just because they are new and shiny. It is important to embrace new ideas, but you must do so intentionally and with purpose.

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