

Grassroots & Advocacy from Scratch

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Your Effort – Where to Begin?

- **Goals & Success**
- **Thinking Like a Small Biz**
- **The Full Advocacy Lifecycle**
- **Tools & Technology**

At the end of the day, it's about the stakeholder. How do we get them involved and then keep them coming back?



Goals & Success



- What does success look like in 3 / 6 / 12 months?
- If you fail, what's the cause?
- Start with What You Have:
 - Total # of Stakeholders
 - Total # of Engaged Stakeholders
 - Breakdown by Division / Group
 - # of Key Contacts
 - Strength & Type of Relationships

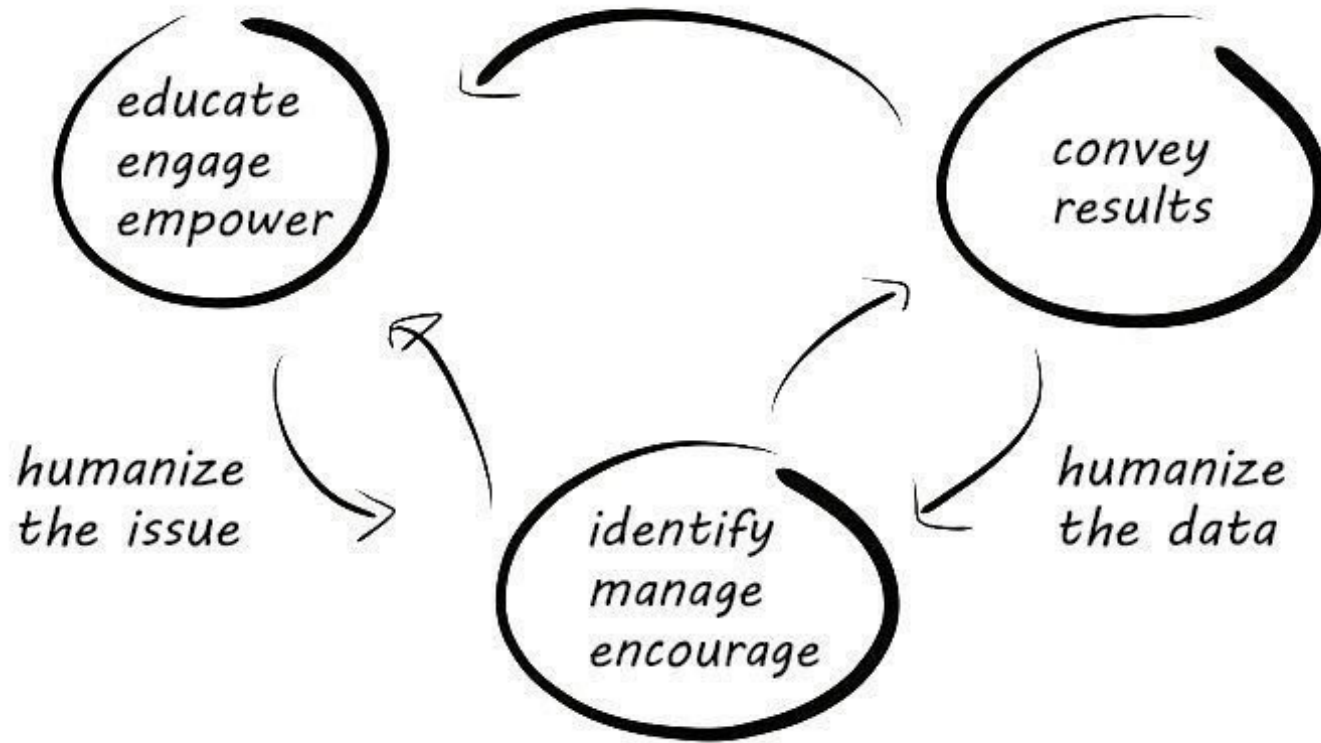
Think Like a Small Business

- Client Acquisition
- Client Retention
- Customer Service
- Direct Marketing
- Outside Challenges

Your advocacy effort has challenges not unlike those faced by a small business – How do I not only make the sale, but find the perfect repeat customer?



Full Advocacy Lifecycle



*The most effective advocacy we've seen
has hit on all three of these pillars*

- **The Story**
- **The Tools**
- **The Database**
- **The Follow-up**
- **The Results**

Educate, Engage, Empower



It's more than just letters, calls or tweets – make the connection with the stakeholder and they'll come back to participate again & again

- **The Audience**
Who are we targeting
- **The Destination**
Where do we want to them to go
- **The Action**
What do we want them to do
- **The Follow-Up**
Think Relationship Building

Track, Manage, Encourage



Don't try and convert your entire universe – segment, target and be smart with outreach & you'll see the results with higher engagement

- **The Audience**
Who's participating
- **The Source**
Where are they coming from
- **The Action**
What are they doing
- **The Follow-Up**
What can we learn about them

Convey Results



Tailor the results to your audience. Humanize the data to show the effect of your effort on specific districts & tell meaningful stories

- **The Audience**
Who's Taking Action
- **The Source**
Where do they live
- **The Result**
What difference did you make
- **The Follow-Up**
How to leverage to next steps

Tools & Technology

- Website / Content Tracking
- CRM / Database Tools
- Email & Text Messaging
- Advocacy Tools
- Automation Tools
- Legislative Tracking
- Grasstops Management
- Social Media Management
- Creativity & Designing Tools



Google Analytics



Hootsuite



buffer

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*Start with the data and layer tools on from there.
What do you have & where do you want to go?*

Considerations

- **Need:** Think now & into the future
- **Cost:** Budget & expectations
- **Features:** What's being offered
- **Roadmap:** Is it updated regularly
- **Support:** Are they there when needed
- **Referrals:** What are others saying

Assess your needs & keep your goals in mind. Both will help drive what will work best for your organization – both now and into the future.

Bringing it All Together

- **Identify the Goals & the Baseline**
- **Identify the People Who Can Help You**
- **Identify the Data That Will Get You There**
- **With Needs in Hand, Build the Matrix for the Tools You Need**



Thank You

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