



# Managing a Corporate Grassroots Campaign

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Transamerica

# Transamerica & WFG

## **Transamerica**

- 6,000+ employees
- Started with semi-yearly outreach around major issues
- Partner with trade associations
- Email Action Alerts

## **WFG**

- 67,000 Agents
- Brought them into the fold in 2022
- Quarterly outreach focused on state issues
- Partner with their internal communications team to send email action alerts

# Building a Successful Grassroots Program

- 3 components of a successful grassroots operation
  - Planning
    - Issues
    - Frequency
    - Universe
  - Goal Setting
    - Awareness
    - Engagement
    - Persuasion
  - Managing Expectations
    - Start Small
    - Scale Up

# Planning

- Identify Issues
  - Collaborate with Federal & State Lobbying Teams
    - Clear and Compelling Message
    - Flexibility
    - Creativity
- Frequency
  - How Often Should You Communicate
    - Quality over Quantity
- Universe
  - Targeting Your Audience

# Goal Setting

- Define
  - What do you hope to achieve with your program
    - Build awareness
      - Educate around a particular issue
    - Engage
      - Letters to the editor, peer to peer campaigns
    - Persuasion and Affecting Outcomes
      - Targeted letters to legislators and policy makers

# Managing Expectations

- Start Small
  - Aim to develop muscle memory
  - Awareness vs. Engagement vs. Persuasion
- Scale Up
  - Increase Audience
    - Federal or State or Both
  - Increase Frequency
    - Quarterly, Monthly, Semi-Monthly, Weekly
  - Increase Scope

# Managing a Corporate Grassroots Program

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# Explaining the why

When we talk about advocacy at Walgreens, we often use a coin analogy.

We need both sides of the advocacy “coin” (political action and grassroots engagement) in order to advance our policy priorities.

Team members learn that their voice matters and the stories they share about the patients and constituents we serve are most impactful with lawmakers at all levels of government.

## Why political advocacy?

Effective political advocacy is critical to achieving our company's strategic goals.

Walgreens Government Relations works every day to advocate for our company's issues in Washington, D.C. and in state capitals across the country. These efforts can be bolstered by financial support and direct advocacy from our fellow team members.

Robust participation in these programs can directly affect our ability to support candidates who understand our issues and educate decision makers in government.



**WalgreensPAC is a political action committee.**

- Involves money.
- Does not involve direct advocacy for our issues.



**Together Walgreens is a grassroots advocacy program.**

- Does not involve money.
- Does involve direct advocacy for our issues.



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# Strategies for organizing and structuring your grassroots program

# Setting up your program

- Do your homework/research: talk to others outside your GR department!
  - Focus groups/methodology; especially important to obtain feedback from the field if you have a corporate/field model.
  - Identify and build relationships with other internal stakeholders: IT, legal, HR, Communications/Marketing
- Determine who can participate (“eligible class”)
  - Work with legal and HR
  - Ours mirrors our PAC eligible class, so not all team members can engage
- Consider your advocate base
  - Employees vs external advocates
- What’s your focus?
  - Federal? State and Local? Both?

# Resources and Infrastructure

- Develop your marketing materials
  - Create a one pager or slide that explains the program
  - Create launch plan/timeline
- Interview vendors
  - Software and creative (if needed)
- Name your program/consider creating swag as a way to build brand awareness and excitement
- Build website/online action center
  - Can be narrow and issue-driven or more comprehensive (and offer team members an open platform to engage with lawmakers)
  - Include civic engagement/GOTV education as complementary offering
- What's your primary way of activating advocates?
  - Online vs. in-person advocacy

## What is Together Walgreens?

- **Together Walgreens** is our grassroots advocacy program. It is a way for employees to use their experience and expertise to educate lawmakers on the issues that affect our company.
- Government Relations works every day to advocate for our positions with decision makers and legislators, but **it is critical that these officials also hear from the pharmacists, retail professionals, and field leadership** who directly interact with our patients, customers, and communities.
- **This program is a complement to WalgreensPAC**, our political action committee. While the PAC financially supports candidates for office, the grassroots program is a means for employees to communicate directly with elected officials on policy issues.
- You can visit the [Together Walgreens](#) website for more information.

## Who can participate?

- **Participation is restricted to team members who meet our criteria.** For a variety of legal and compliance reasons, only salaried, non-union employees will be allowed to participate in Together Walgreens.
- Participation in Together Walgreens is **completely voluntary and unpaid**, and participation does not affect a team member's employment in any way.



# In-person vs. virtual advocacy opportunities

- Traditional action alerts via grassroots action center website
- Can also collect stories and testimonials via webform
- Fly-ins: company-specific or coalition-driven
  - Provides an opportunity for engaged team members to advocate in DC and/or at the state/local level
  - Demonstrates leadership and professional growth within company
- In-district grassroots advocacy opportunities:
  - Store tours and Pharmacy visits
  - Distribution center tours
  - Issue Roundtables/field hearing opportunities



# Grasstops

- After you've established a base of advocates, identify those who participate consistently and engage with government relations efforts
- Engaged advocates will want to do more
  - These are your advocates who will do in-district tours and site visits, consider participating in DC or local fly-ins, and may have a stronger understanding of your policy issues that would lend to more “in the weeds” conversations with lawmakers
- Consider cultivating a class of these advocates in key districts (based upon footprint or congressional leadership/committees of jurisdiction)
- Celebrate your people: recognition matters!
  - Consider highlighting an advocate in a quarterly newsletter/advocacy update – we are all curious about colleagues and like to see familiar faces in print!
  - Take your program to the next level and gamify grassroots engagement: develop metrics to rank advocacy participation and award an “advocate of the year”

# Winning Management Approval

- Tailor your Pitch
  - Understand your audiences goals and values
- Frame the Issue
  - How does it fit into the bigger picture
- Timing is Essential
  - Keep an eye on legislative developments impactful to your company
- Build a Coalition
  - Increases odds of getting buy-in more quickly

# Answering Tough Questions

- Be Prepared
  - Facts
  - Examples
  - Case Studies

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# Communications and engagement best practices



# Communications and engagement best practices

- Sometimes issues come up fast and furious and necessitate quick action
  - Other times you can build out a multi-level campaign that follows a piece of legislation through regular order aka from bill intro – grow cosponsors – hearings – floor consideration, etc.
- **Action alerts:** Short, sweet, easy to take action
- Grasstops engagement opportunities
- **Follow up:** Did the bill gain cosponsors? Obtain a vote on the floor? Let the people know!
- Consider how you'll **keep advocates updated:** Is it a quarterly newsletter? Infographic? Virtual town hall?
- **Say thank you!** They're taking time out of their daily work to engage on a topic that helps advance your company's mission/policy priorities/etc

# Metrics

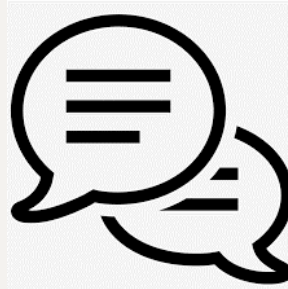
- Figure out what metrics matter in your program: Success can look different; did you kill a bill? Did you need X letters to convince a state legislator to change their position?
- Track open rates/engagement/offices reached
- Consider message segmentation
- Connect with colleagues in communications to identify best send times/gain awareness of “quiet periods”

# Takeaways



## **Pivoting is not failure.**

Collect data and know your metrics, be prepared to try new tactics or different strategies!



## **Communicate more!**

Keeping advocates informed helps drive consistent participation and repeat engagement. Offer a variety of advocacy opportunities.



## **Automate where you can.**

Create templates and timelines for annual events, such as fly-ins and in-district opportunities. Work smarter, not harder!