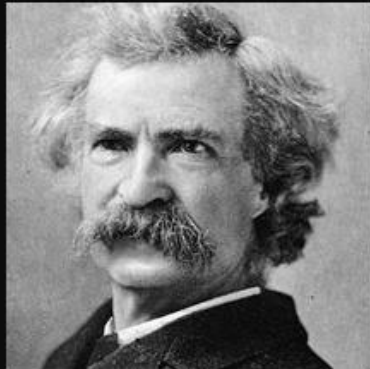


How to Manage Your Advocacy Database

Tips and Strategies for Success

Have a Plan.



Data is like garbage. You'd better know what you are going to do with it before you collect it.

~ Mark Twain

AZ QUOTES

What's Your Data Plan?

- Write it down.
- Look at what your CRM has now. Export it into a spreadsheet.
- Think about what data you want. Add those columns.
- Put the source of the prospective data into those columns.

Ready Connect	Ready Connect	Ready Connect	Ready Connect
\$35 ⁰⁰ /mo.	\$40 ⁰⁰ /mo.	\$45 ⁰⁰ /mo.	\$50 ⁰⁰ /mo.
Basic Phone/Smartphone Ready Connect Plan <ul style="list-style-type: none">- Unlimited Talk- Unlimited Text- Unlimited Mobile Web for Basic Phones.- Unlimited 1X Data on the U.S. Cellular Network for Smartphones.- Nationwide Calling- Free Long Distance- Up to 200MB of data usage/month/line may be used while roaming- Unlimited Talk.	1.5GB Ready Connect Plan <ul style="list-style-type: none">- Unlimited Talk- Unlimited Text- 1.5GB High-Speed Data - data speeds slowed to 1X after 1.5GB.- Unlimited 1X Data on the U.S. Cellular Network.- Nationwide Calling- Free Long Distance- Up to 200MB of data usage/month/line may be used while roaming.	3GB Ready Connect Plan <ul style="list-style-type: none">- Unlimited Talk- Unlimited Text- 3GB High-Speed Data - data speeds slowed to 1X after 3GB.- Unlimited 1X Data on the U.S. Cellular Network.- Nationwide Calling- Free Long Distance- Up to 200MB of data usage/month/line may be used while roaming.	4GB Ready Connect Plan <ul style="list-style-type: none">- Unlimited Talk- Unlimited Text- 4GB High Speed Data - data speeds slowed to 1X after 4GB.- Unlimited 1X Data on the U.S. Cellular Network.- Nationwide Calling- Free Long Distance- Up to 200MB of data usage/month/line may be used while roaming.

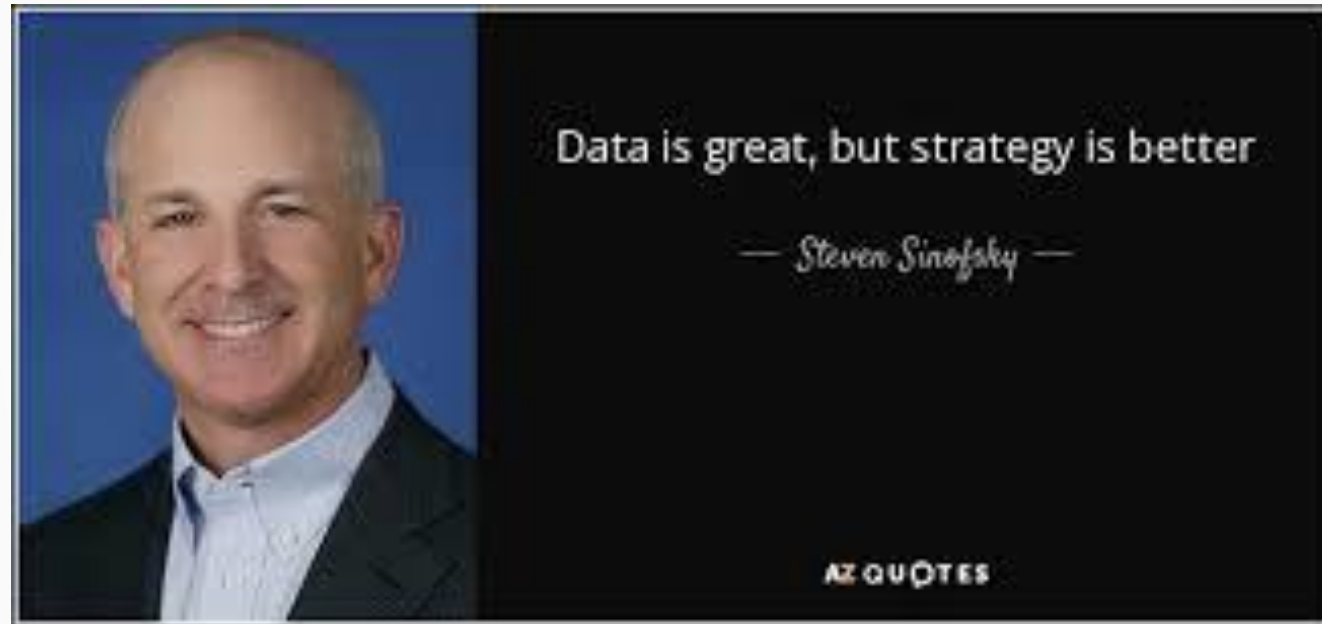
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Make a Data Map

	A	B	C	D	E
1	Data	Data Type	Existing/Future	Data Source	Budget?
2	Membership ID	Membership Data	Existing	Monthly Membership Import	N/A
3	First Name	Membership Data	Existing	Monthly Membership Import	N/A
4	Last Name	Membership Data	Existing	Monthly Membership Import	N/A
5	Employer Name	Membership Data	Existing	Monthly Membership Import	N/A
6	Business Unit	Membership Data	Future	Monthly Membership Import	N/A
7	Department	Membership Data	Future	Monthly Membership Import	N/A
8	Supervisor	Membership Data	Future	Monthly Membership Import	N/A
9	Home Address Line 1	Membership Data	Existing	Monthly Membership Import	N/A
10	Home City	Membership Data	Existing	Monthly Membership Import	N/A
11	Home State	Membership Data	Existing	Monthly Membership Import	N/A
12	Home Zip	Membership Data	Existing	Monthly Membership Import	N/A
13	Senate 1	CRM Data	Existing	CRM Software	N/A
14	Senate 2	CRM Data	Existing	CRM Software	N/A
15	MOC	CRM Data	Existing	CRM Software	N/A
16	State 1	CRM Data	Existing	CRM Software	N/A
17	State 2	CRM Data	Existing	CRM Software	N/A
18	State Rep	CRM Data	Existing	CRM Software	N/A
19	Political Coordinator	Political	Existing	Manual Staff Import	N/A
20	Donor Level	PAC	Existing	Manual Staff Import	N/A
21	Last Receipt Amount	PAC	Existing	Bi-Weekly Accounting Import	N/A
22	Last Receipt Date	PAC	Existing	Bi-Weekly Accounting Import	N/A
23	Salary Class	Membership Data	Future	Bi-Weekly Accounting Import	N/A
24	Gender	Membership Data	Future	Unknown	Yes, unbudgeted
25	Party Affiliation	Political	Future	Data Broker	Yes, unbudgeted
26	Voter Score	Political	Future	Data Broker	Yes, unbudgeted
27	Candidate Support 2016	Political	Future	Data Broker	Yes, unbudgeted
28	Candidate Support 2017	Political	Future	Data Broker	Yes, unbudgeted
29	Candidate Support 2018	Political	Future	Data Broker	Yes, unbudgeted

- Create types of data:
 - PAC, Political, HR, etc.
- Do you have this data now?
- What is the source of the data?
- Will it cost you to procure this data?

Have a Strategy.



The Basics

- Name and Address (Duh)
 - Home and work locations
 - # of constituents in district # of employees in district
- Organizations
 - # of work sites in district and counts of employees
- Track Actions taken and contributions given
 - If in separate systems cross-pollinate data!



You should also be tracking
and measuring:

-
- Legislator Relationships
 - Activities
 - Fly-Ins
 - In-District meetings
 - PAC Receptions/Check deliveries
 - Site visits



Consider Adding

Demographics

- Age
- Gender
- Length of service/membership

Electoral Data

- Party Affiliation
- Voter Scores
- Electoral History

Have a Team.



Your Boss

- Lay out a vision about what this data will do to make him (and you) look good.
- Tell a story about how it will help you meet his objectives to grow your advocacy participation, mobilize members to vote, or grow your PAC.
- Elicit his help to navigate budget needs and support of other stakeholders whose help you need.



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Human Resources/ Membership Dept.

- Gender.
- Age Ranges.
- Business Unit/Department/Division.
- Supervisors.
- Salary Ranges.
- Region.
- Leadership/Committees
- Cares about access to sensitive information. Cares about legality of data collection.



Accounting

- Financial Transactions.
- PAC Data.
- Compliance.
- Likely interested in your Analytics.
- Cares about data accuracy. Cares about ROI. Will care that you care.



IT

- SSOs (single-sign-on).
- Data transfers.
- Data Security and access to sensitive information.
- Cares about security.
Cares about security. Cares about security.



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CRM Vendor

- Ask about data integration.
 - Webservices
 - FTP based data transfers
- Avoid manual imports.
- Assess your growth plan if they can keep pace.
- Are they a partner in your strategy?
- Tell them about your projects in advance so they can plan.
- Cares about renewal. Leverage that.



Data Broker

- Ongoing cost! A long term relationship.
- Understand costs going in and get quotes. Size matters.
- Ask your friends for references.
- You want:
 - Voter Data
 - Party Affiliation
 - Past election participation
 - Voter scores
 - Gender Data
 - DOB Data
 - Candidate Support Data



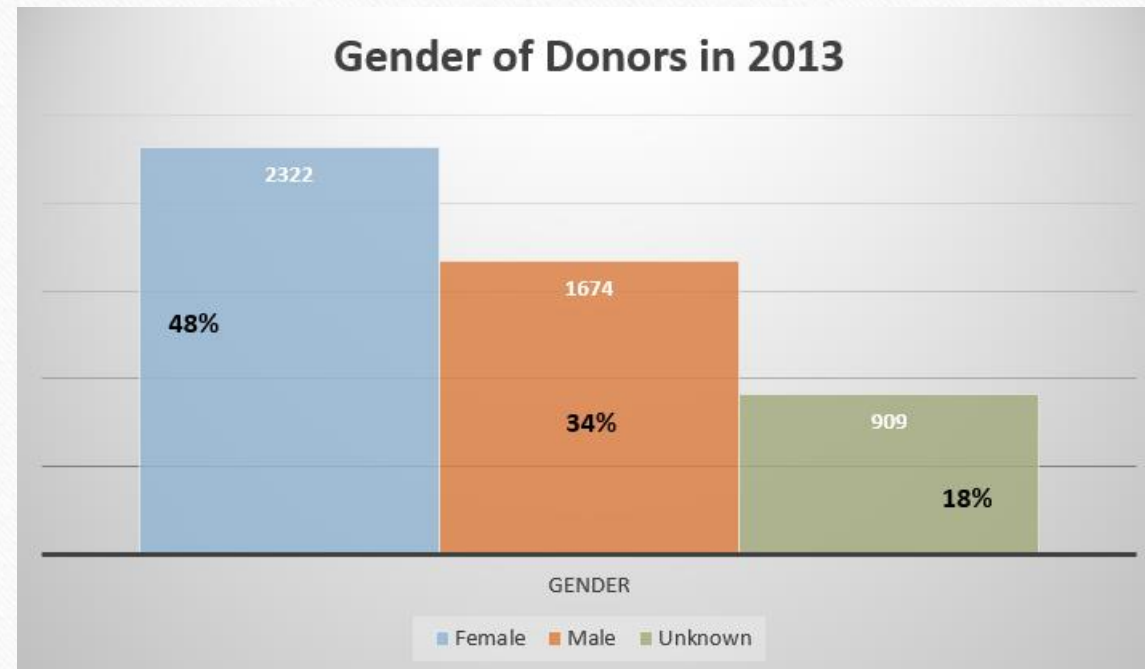
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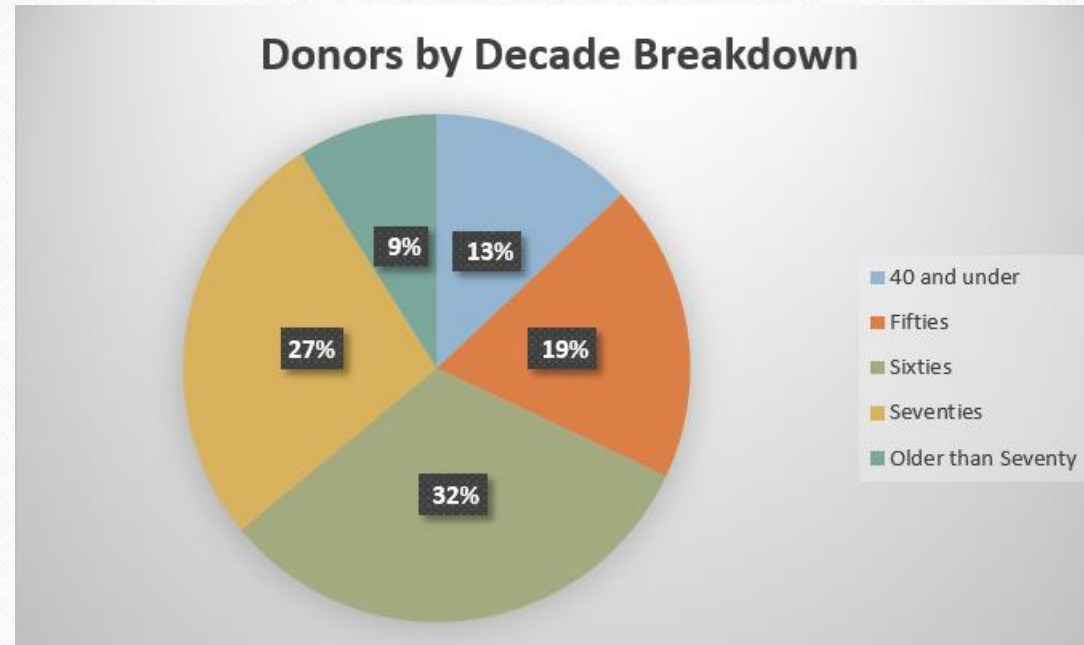
Creating Data Profiles

- Here are some of things I wanted to know.
- And yes, we were routinely shocked by the data.
- And yes, we were wrong about almost everything.

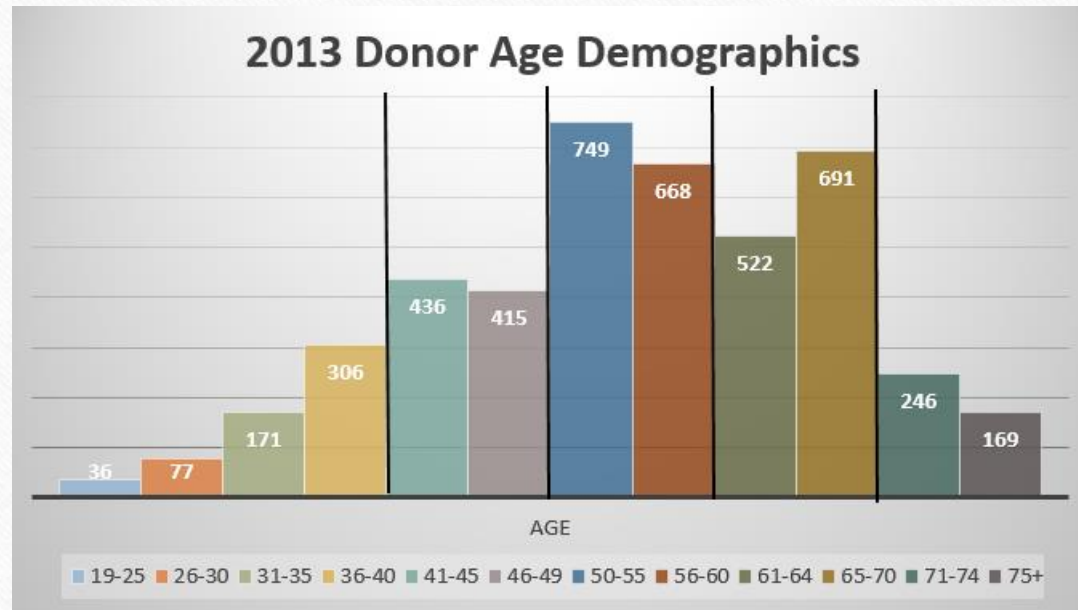
Critical Reports: Gender



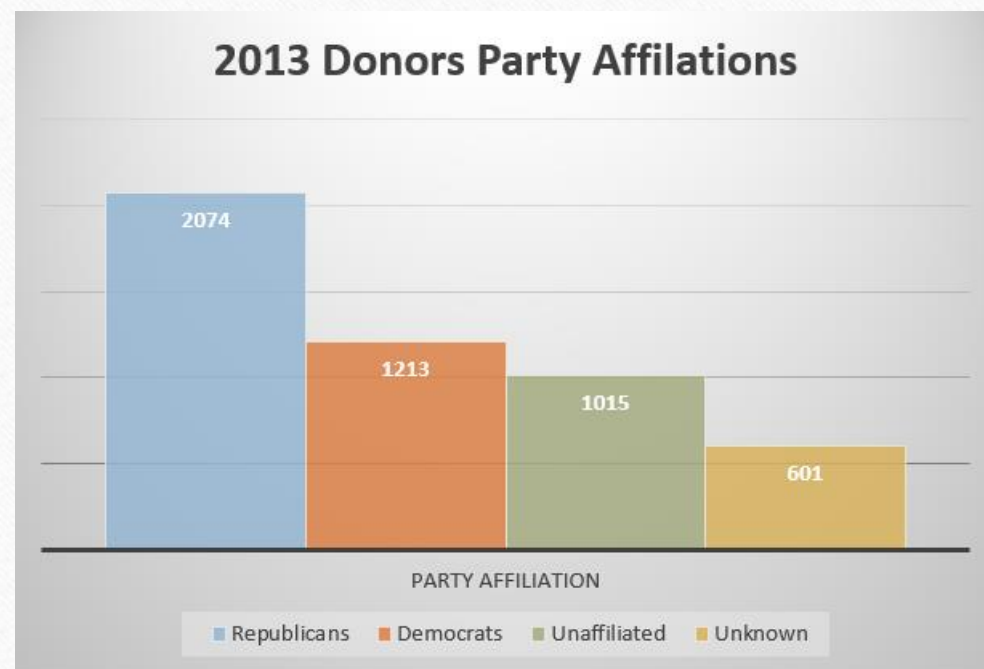
Critical Reports: Age



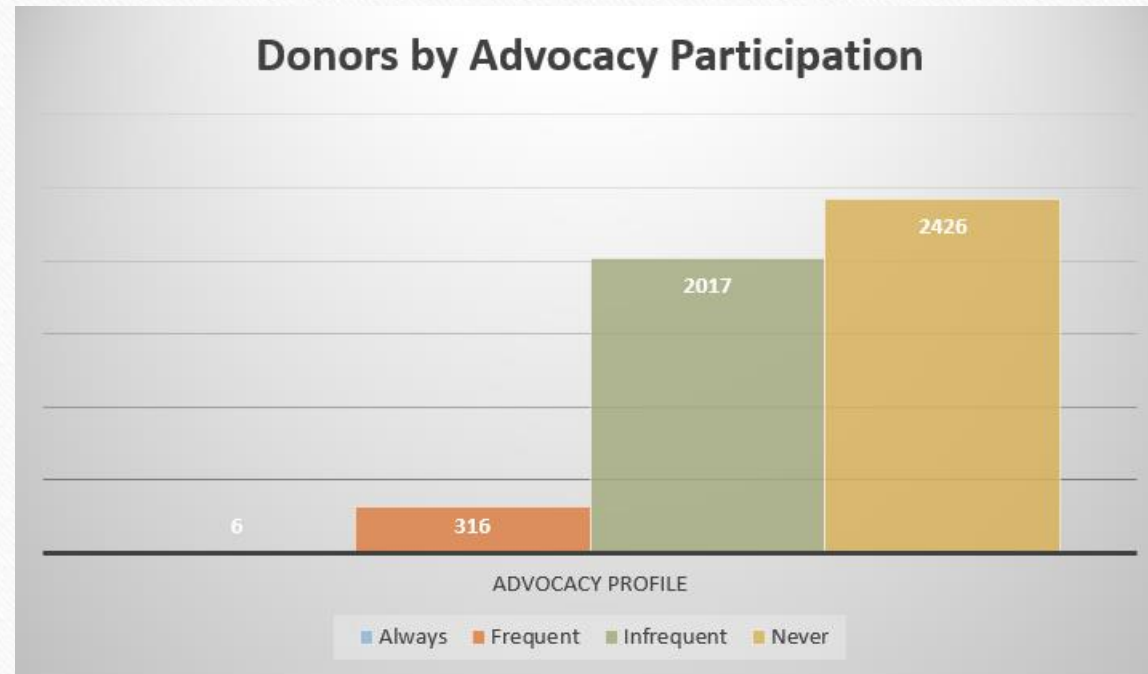
Critical Reports: Age



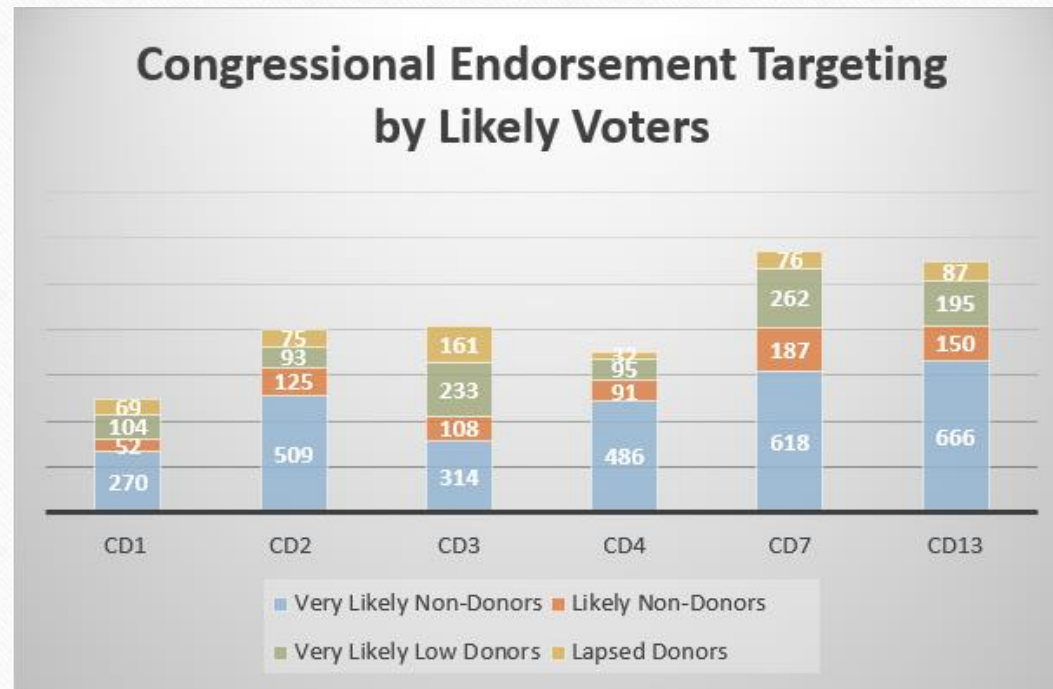
Critical Reports: Party

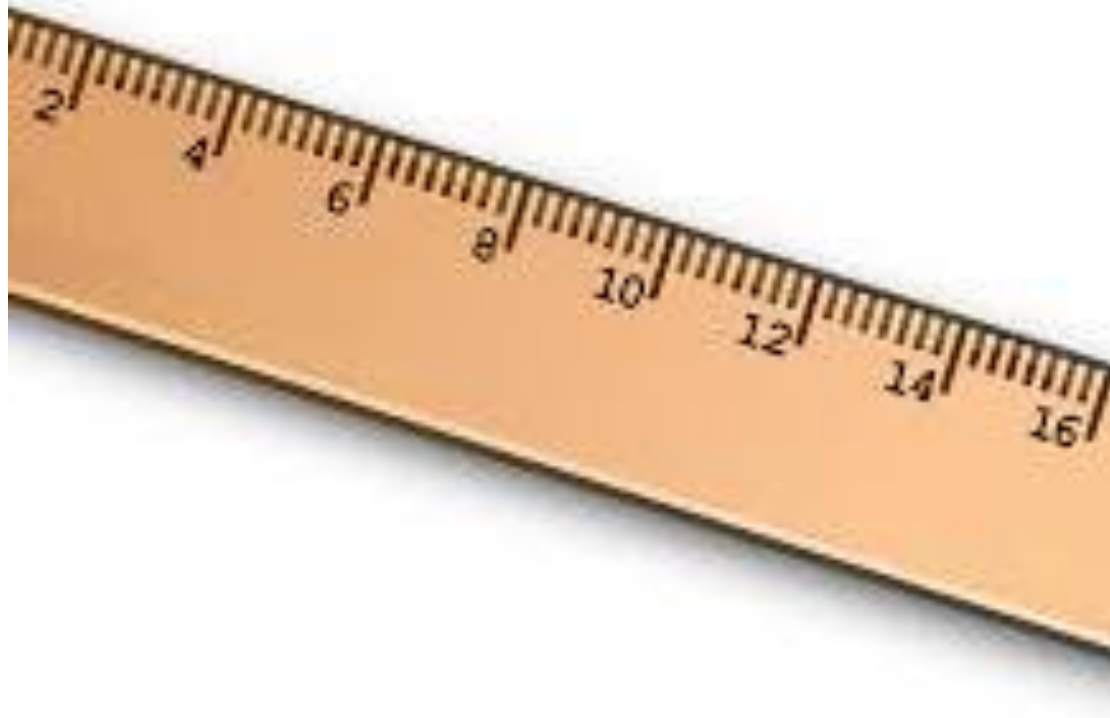


Critical Reports: Grassroots & Donors



Critical Reports: GOTV





Benchmarks

- Annual process. Make time for it. Time intensive.
- Write down what you think it is. Ask your stakeholders what they think its too.
- Structure a dialogue to present results.
- Make recommendations.

Use the Data to Segment Strategically

- Remember it's not the size of your list that matters. It's what you do with it.
- One size does not fit all.
- Make it Work!
- Consider if you have staff and resources to do this yourself or you need to hire a consultant.

15 Recommended Segments

Segment	Profile	Week	From
1	Age: Appeal to non-investors under 40. Possible to test one from female to female, one male to male and one generic against one another.	9/8/14	2014 YPN Chair
2	Age: Appeal non-investors under 60. No further screen.	9/8/14	RPAC Trustee in this age range
3	Congressional District: Specific Appeals to non-investors in CD1, CD2, CD3, CD4, CD7, and CD13. Appeal driven by members in these districts with same party affiliation of endorsed candidate and who Always Vote. Message to be geared towards helping get that candidate elected and how RP protects real estate in DC.	9/8/14	RPMIC Member
4	Act Don't Invest: Appeal to members who always take action but haven't given to RPAC. Tie importance of doing both.	9/8/14	Cady Thomas or RPMIC Member
5	Lapsed: Brokers in BIP	9/15/14	BIP Liaison
6	Lapsed: Board of Directors	9/15/14	Call from Andrea
7	Lapsed: AEs	TBD	Call from Andrea
8	Lapsed: 2013 & 2104 Presidents	9/15/14	Current and Incoming Presidents
9	Lapsed: Committee Members	9/15/14	Treasure or Current President or RPAC Chair
10	Non-Investors: Brokers in BIP	9/15/14	BIP Liaison
11	Lapsed Donors: Those who gave in 2013 but not in 2014. We can break these out by 2013 giving amount and personalize them to give at stated level they gave the prior	9/15/14	TBD- Various.

Best Practices: Sending Action Alerts or Solicitations

- Proof Your Subject Lines!
- Consider the “From” Name and Email Address
- Test Your Dynamic Tags
- Double Check Your Call to Action or Solicitation Links
- Quality-Check Your Content
- Make It Mobile-Friendly
- Verify Your List
- Could It Be Considered SPAM?
- Stay Compliant
- Test Your Email. Then Test It Again.

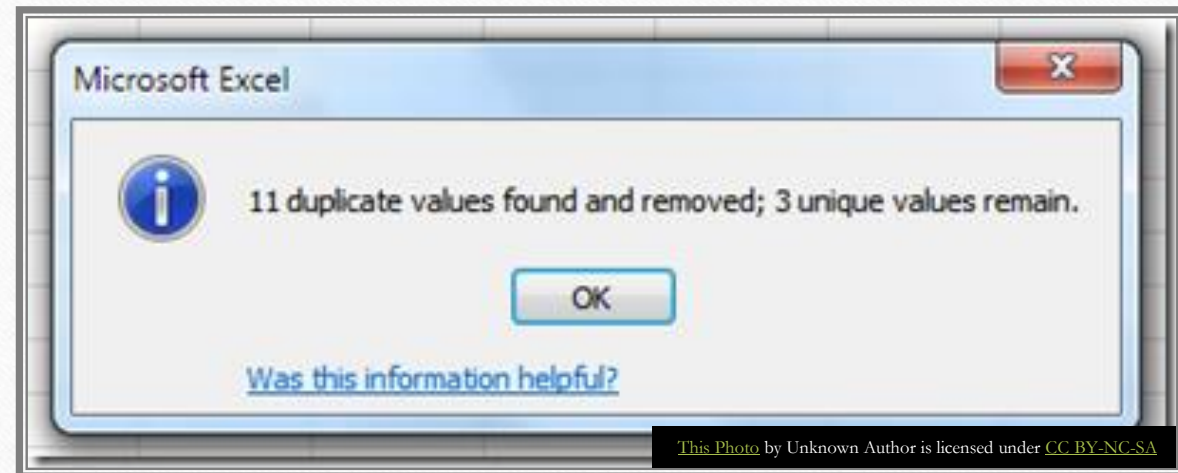


Practice Good Hygiene.

**DID
YOU WASH
YOUR
HANDS?**

Duplicate Records

- Make sure your CRM has this capability when shopping for a vendor!
- Perform the dedupe once a quarter to twice a year.
- This gives you great insight into data problems you are having that you don't know about, especially if you perform manual imports.



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Order Your Fields

- Group your data
 - Political Data
 - PAC Data
 - Membership Data
- Make it easy to find what you need to build segments.
- Most CRMS allow you to order the fields and relabel them from the data file headers.



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Purge

- Don't hold on to old data.
- Manage your actives/inactives.
- If they don't work there anymore or are not a member anymore – move them out or they mess up your analytics.
- Set aside one day each spring to clean up lists, fields and archive old info.



Pet Peeves

- Pick Lists! Why have one field when you can have 20?
- Dear NANCY,
- Monitoring unsubscribes.
- Not updating the info often enough.





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