INTRODUCTION TO ONLINE CAMPAIGNING

Everything Your Union Needs to Take an Online Campaign from Start to Win

BY ALEX WHITE
About Alex White

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Nothing feels as good as winning feels.

This booklet is designed to help you win your online campaigns. It was originally published in 2012, but has been updated for 2020.

Online campaigning is about winning. For union campaigners, it’s about winning the war on workers.

My goal is to provide a practical tool kit for organisers and campaigners in the field. I have tried to give my honest views and thoughts on organising and the challenges facing unions.

This guide is fairly long, but that’s because I’ve tried to make it as comprehensive as possible.

Who should read this?

This introduction is a resource for small to medium sized online campaigns, run by one or two people who are not experts in online campaigning. In writing this, I am assuming that your budgets are limited and that campaign decision-makers may be unfamiliar with the benefits and opportunities offered by online campaigning.

This guide may also be read by a union leader who wants to get an overview of digital campaigning and contemporary best practice, but who will not necessarily be running the campaign.

If you have experience with digital campaigning, then much of this introduction will be familiar to you. In this case, I would suggest using this
introduction as more of a check-list than a how-to. If you’re familiar with traditional campaigning, many of the principles can be transferred across to online campaigning.

Australian online campaigning is in a strange place. We’re very interested in the developments taking place in the USA and UK, but have yet to implement many of those techniques.

In 2004, the union movement pioneered digital campaigning with the Your Rights at Work campaign, although it was still very much an adjunct to the traditional media advertising and field campaign. Since then, the priority for the union movement has been adopting field (face-to-face and phone) campaigning.

Various unions have experimented with new technology, apps, AI and the like, but adoption is not widespread. In fact, most unions are still using out-dated membership databases that are many generations behind the basic “off-the-shelf” CRM databases used by the corporate sector.

You don’t need to “code” to be a digital campaigner. But it helps. The truth is that you don’t need any specific coding skills to be an effective campaigner. Increasingly, tools are designed for non-coders to install, use and optimise. However, you do need a willingness to understand the basics of what coders are talking about. The number one skill you really need is not coding, but Googling. Almost every trick, tip or piece of technical knowledge you’ll need about emailing, advertising, SEO or optimisation can be found on Google.
Furthermore, in the mid-2010s, something terrible happened: there was widespread adoption among unions of Nationbuilder. This decision, in my view, significantly set back the technological innovation of most unions that started using Nationbuilder, either stopping it altogether or making it prohibitively expensive.

If your union is still using Nationbuilder, hopefully this guide can help you decide to dump it. But even if you continue to use Nationbuilder, most of the advice in this guide will still be useful.

Get rid of the digital department. A decade ago, when digital and social media were “new”, it made sense to have a specialist digital campaign officer or team. Today, there’s so much overlap between what off-line organisers and campaigners do, and online that it makes little sense to have a separate digital team.

So what should your union do? Ideally, everyone in your campaigning and organising teams should have digital skills. They should all have access to the social media and email tools that were once kept only for the digital team. Your union should train all your organisers and campaigners in basic digital literacy, and continually maintain those skills.

Real world action

Underlying much of the advice in this guide is the notion that online campaigning should drive real-world action. You can’t win a campaign solely by emailing people, and you can’t win by through petitions or Facebook likes.
Thankfully, no one regards online campaigning as a silver bullet any longer. However, online campaigning is an essential element of any campaign, even one focused on mobilising and organising people in the real world. Activism and volunteers are essential to win campaigns: online campaigning is about identifying, recruiting and engaging those people.
Why digital campaigning matters

Ultimately, digital campaigning and online communication is just one channel in the campaign mix, along with field, direct mail, phone calls, door knocking, street stalls, and broadcast advertising (e.g. newspaper, television and radio, and digital broadcasting like Youtube or Spotify advertising).

However, adults now spend more time consuming content on digital platforms than any other media type — the average adult spends over 6 hours with digital media, and it’s increasing! What’s more, most adults now check their main social media accounts and email immediately after waking in the morning and immediately before going to sleep in the evening (mostly on their phone).

The entire purpose of digital campaigning is to help win. The corollary to that is that digital campaigning should have an effect in the real world.

Online campaigning that never leaves the Internet (“clicktivism” or “slacktivism”) is useless. Real people need to do real things in the real world. Without achieving these three things, online campaigning is just a waste of time and money.
All campaigning is digital now

Within the union movement, the contemporary view of political organising is built on the belief in human-to-human contact to build a connection and spur workers to take action (to join the union, to go on strike, etc).

For over a century, in-person workplace organising has been the predominant way to do this. It is grassroots, authentic, and, without human contact between people it is almost impossible to build power. Traditional organising allows unions to identify future members and delegates, and ensures the union is seen as a part of the workplace. At election time, it is face-to-face and 1:1 organising that can be crucial in shifting the final few hundred votes in a tight election. No movement can yet rival the union movement in our ability to organise and mobilise.

But face-to-face organising (field organising) isn’t the first and last tactic that union campaigns should use. Most field campaigns have their organisers and volunteers recruit other volunteers, hold in-person events like rallies, knock on doors and make phone calls. But unions can do more and reach more people when it comes to using the internet to talk to members’ and supporters coworkers, friends, neighbours, family, and classmates.

Digital organising can amplify and supercharge traditional organising, and it should be seen as an amplifier, not a replacement. Increasingly, unions are are using relational online organising tools, like digital phone banks, and Facebook groups to push out their message online — which is great! But it is just the beginning.
Tools and tech are critical, but to be truly useful, they should not live in a silo with your digital campaign team.

True online organising requires arming your organisers and campaigners with the best of tech and tools, then supporting and amplifying them across the rest of your campaign. In addition to talking face-to-face with members and delegates, organisers should be trained to use Facebook and given access to advanced email tools. As noted earlier, you should abolish your digital team. All teams are (or should be) online.

In fact, every part of your union should be given access to the best digital tools. This includes the “back office”. With an increasing number of members joining online, your admin, membership and finance teams should be trained in how to use digital tools, and be aware of what is driving new members and new income; the legacy systems these teams use should be linked to the tools used by your organising and campaign teams.

“Online” is not just about communications any longer. It is not just about websites and social media and emails.

**Online campaign principles**

The following principles underpin successful online campaigning strategies.

**Take online support offline**

The overriding principle of your online engagement strategy will be to prompt and encourage offline action. Online support and engagement
is meaningless if it does not contribute to the real-world campaign effort for your union.

Action will rely on the psychological principle of small asks leading to large asks.

**Build relationships with supporters**

The online strategy aims to create a relationship with your union. Building relationships takes time, and so it is important for your union and the campaign to demonstrate trust with your supporters through listening and two-way conversations.

**Tap into existing networks**

There are many existing networks of support for unions, both online and offline. Often, these can be unexpected. For example, for workplace safety campaigns, health and medical groups can often be supportive.

Where possible, you should support and empower existing communities, thus deepening engagement and saving scarce resources. It can be tempting to try to create new networks for each campaign, but building new communities from scratch is difficult, expensive and time-consuming, and also require a long-term commitment to maintain the network.

In all likelihood, there are a range of existing networks and community groups (both online and offline) for you to tap into. For example, if you’re running a campaign to engage young workers, rather than trying to create an online group of young workers, you may get better results in trying
to find and engage with existing online networks of young people, that may be in unexpected places; for example forums for gamers, Reddit, or Facebook groups for young job-seekers.

**Build credibility and trust**

Honesty and frankness with your online supports will help build trust. Because your goal should be to promote offline action, trust and relationships are essential. One way that the campaign will build credibility and trust is through being open with your strategy to supporters, and invite outsider supporters (your “owners/leaders”) into your campaign. You can also build trust through using testimonials and promoting your supporters on your website and other campaign material.

**Incentivise engagement**

Your campaign should consider how it can offer incentives to deepen engagement. Incentives could be determined through segmentation; and could include, for example, recognition (supporter showcased on your campaign website), inclusion (supporter included in “strategy” phone-call), validation (thank you note from the union’s leader, or breakfast with campaign staff) and “free stuff” (campaign “gear” such as campaign t-shirts, stickers). Incentives should not be cash: research shows that paying volunteers will actually diminish their desire to volunteer.

**Personalise**

Finely grained personalisation is now possible thanks to a range of digital tools; differentiating different supporter/voter segments is important to effective and efficient targeting, positioning and marketing mix.
Personalisation will help you promote engagement and build online relationships with your campaign. With a small campaign, there will be a natural limit to how personal and segmented you can go. There is a law of diminishing returns on effort in and reward out. The engagement funnel is a good start for personalisation, but you will be limited by the quality of your data.

**Deputise advocates**

Engaged community members and supporters will tirelessly promote and defend your union and your campaign. Of course, unionists know this instinctively when it comes to delegates; and this should extend to online advocates also. Your campaign should empower those people, and trust them to take ownership. Deputised advocates will also reduce resource costs for your campaigns, help manage your online community, provide feedback and help build your campaign’s brand. Your advocates will also allow you to rapidly respond online to attacks/criticisms during the campaign.

**Why engagement?**

Engagement drives loyalty and strengthens relationships.

Engagement is strongly correlated to motivation, loyalty, consideration and choice. Highly engaged supporters are strong advocates, demonstrate greater loyalty, are more likely to engage in word-of-mouth activities, and therefore to encourage others to join your union, support your campaign and take action.
The engagement funnel

The engagement funnel is not a new idea, and you’ll see variations of the theme expressed numerous different ways. It could be a ladder or a pyramid or a pipeline. There could be three levels or five or seven.

I’ve chosen a funnel, because a lot of online marketing services (like Google) refer to funnels. The five levels are arbitrary. You could have three (non-supporter, supporter, activist) or you could finely categorise them into many more levels. You may also have multiple funnels, i.e. one for union member volunteers, one for non-member volunteers.

This tool should help you think about what kind of engagement different people will need at different times. Your supporters and volunteers will have varying levels of interest and commitment, and the funnel acts as a framework to match your asks and contact accordingly. The funnel also helps you pick and choose different tools to communicate and engage with your supporters, depending on where they are in the funnel.

The purpose of the engagement funnel is to create measurable goals and act as a model for understanding and action.

The top of the funnel is more technology-focused and automated. Using technology to scale engagement efforts lets you reach lots of people. Websites, databases and marketing automation tools, email and social media are the tools you will use for this.

The bottom of the funnel entails focused levels of engagement, which are more personal and labour-intensive. Websites, email and social media still play a role, but there will be more human, face-to-face contact. New membership database tools (or campaign CRMs) allow this kind of
personalised, customised engagement to be more easily managed than in the past. Many of these now integrate with the Google G-suite and Microsoft’s Outlook/Office.

The funnel is not just for online action, but importantly, it should articulate and integrate into your off-line, real world campaign activities.

The funnel is a framework for segmenting the different audiences and supporter groups. These segments create useful, measurable, actionable groups to target.

1. Observing

**Engagement goal** Inspire initial and repeat contact with campaign.
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### INTRODUCTION TO ONLINE CAMPAIGNING

<table>
<thead>
<tr>
<th>Mindset of person being engaged</th>
<th>Somewhat interested in campaign and broadly aware of you. Awareness/interest are major factors.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature of engagement</td>
<td>Sporadic, indirect</td>
</tr>
<tr>
<td>Communication</td>
<td>Person takes occasional, distracted glances at campaign. These are indirect, may be via word-of-mouth, social media, or traditional media (TV, newspaper, radio), so there is no direct communication between them and campaign. Communication focus is information sharing and awareness building.</td>
</tr>
<tr>
<td>Action</td>
<td>Drive them to campaign website, or attend event.</td>
</tr>
<tr>
<td>Metrics</td>
<td>Website traffic, polling, media impressions.</td>
</tr>
</tbody>
</table>

### 2. Following

<table>
<thead>
<tr>
<th>Engagement goal</th>
<th>Offer value (which is mostly not monetary value) and secure permission to deliver direct, proactive communications.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mindset of person being engaged</td>
<td>Understands and is interested in campaign and cares about your mission. Attention/time is major hurdle.</td>
</tr>
<tr>
<td>Nature of engagement</td>
<td>Regular, direct communication.</td>
</tr>
</tbody>
</table>
**Communication**

Person receives stream of direct communication focused on information sharing and increasing interest in campaign’s activities. Goal is to keep campaign “front of mind” and to build enthusiasm.

**Action**

Provide contact information. Reading and watching direct communication from Labor.

**Metrics**

Email subscribers, Facebook fans, Twitter followers, attending event.

### 3. Endorsing

<table>
<thead>
<tr>
<th>Engagement goal</th>
<th>Earn trust to secure endorsement of campaign.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mindset of person being engaged</td>
<td>Believes in campaign’s values/mission and trusts us to approve the use of his/her name to endorse campaign. Endorsement may include financial contribution (donation). Trust and time are major hurdles.</td>
</tr>
<tr>
<td>Nature of engagement</td>
<td>Straightforward, single-step transactions.</td>
</tr>
<tr>
<td>Communication</td>
<td>Regular, direct mass communications to inform and catch interest. Occasional concise communications leading to single call to action.</td>
</tr>
<tr>
<td>Action</td>
<td>Signing petitions, small amount donations, pledges.</td>
</tr>
<tr>
<td>Metrics</td>
<td>Number of petition signers, public endorsements, forwarded emails, email campaign signatures.</td>
</tr>
</tbody>
</table>
## 4. Contributing

<table>
<thead>
<tr>
<th>Engagement goal</th>
<th>Deepen commitment to campaign’s mission and objective.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mindset of person being engaged</td>
<td>Contributes time, money or social capital to campaign. Time and money are major hurdles.</td>
</tr>
<tr>
<td>Nature of engagement</td>
<td>Multi-step assignments.</td>
</tr>
<tr>
<td>Communication</td>
<td>Regular, direct mass communications to inform and catch interest. Additional periodic personal mail, email or phone calls, or face-to-face meetings with campaign organisers for specific activities, projects or funding requests.</td>
</tr>
<tr>
<td>Action</td>
<td>Contributions are considered, but are starting to become habitual. Growing investment in time and resources towards campaign, leading to pattern of behaviour that invests in campaign’s success.</td>
</tr>
<tr>
<td>Metrics</td>
<td>Number of volunteers, regular activists or delegates, number of regular donors; content contributors.</td>
</tr>
</tbody>
</table>

## 5. Owning/Leading

<table>
<thead>
<tr>
<th>Engagement goal</th>
<th>Instill sense of responsibility for campaign; develop leadership skills.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mindset of person being engaged</td>
<td>Fully invested in campaign and its success. Barriers are specific knowledge and skills/leadership skills. May lead others to carry out campaign goals.</td>
</tr>
<tr>
<td>Nature of engagement</td>
<td>Ongoing, collaborative actions/leadership acts.</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Communication</td>
<td>Regular mass communication, accompanied by regular personal contact (mail, email, phone, face-to-face meetings). Flow of communication is two-way and conversational, and is often initiated by person rather than campaign.</td>
</tr>
<tr>
<td>Action</td>
<td>Investment in time, finances and social capital are high. Investments confer sense of ownership over campaign. Contributions become creative. People use “we” instead of “you”.</td>
</tr>
<tr>
<td>Metrics</td>
<td>More subjective — major donors, super-delegates, campaign committee membership, full-time campaign volunteers, etc.</td>
</tr>
</tbody>
</table>
Campaign technology

Decisions made early in your campaign about technology can have significant and lasting impacts on your campaign. Getting the decision wrong about CMS, email service provider or supporter database can make campaigns difficult and can be extremely expensive to work around or fix.

I’ve been involved with a lot of campaigns, with different unions, campaign groups, charities and corporations. I’ve used a lot of different tools personally, and been involved in the decision about picking technology.

The number one piece of advice I have is not a recommendation about a specific set of tools (although I do suggest tools throughout this guide), but rather a mindset behind how to pick your tools.

Does this tool play well with others?

Always avoid technology that locks you into a specific ecosystem. This is the number one tactical concern I have with Nationbuilder, a widely used tool in the union movement. However, increasingly, the union movement seems to adopt databases, email systems and website systems that are “walled gardens” that silo data and don’t integrate with other systems or tools.

If you choose a “walled garden” platform, make sure it offers integrations, and that the provider or vendor provides you with documentation
or details of the integration before you sign the contract. Many of the tech companies selling databases to unions make misleading claims that their systems can integrate with external tools, but then force the union to spend thousands of dollars for custom development.

**Is this tool widely used?**

While not failsafe, a useful shortcut is to see who else uses the tool or product. In particular, your union should look at users of the tool who aren’t in the union movement. Are there political parties using it? What about major charities or campaign groups like Greenpeace or Getup? If another campaign with more money and experience is using something, it probably (but not always) means it works. It is unlikely that your campaign is going to identify a new breakout technology or platform nobody else has ever heard of. Don’t be their guinea pig.

You also benefit from lots of other campaigns using a tool because best practices, data, and strategies are generated and spread more quickly.

**Do the people behind this tool understand both technology and campaigning?**

Advocacy and political campaigning is a unique activity. The company behind the tech tool should understand the nuances of campaigning compared to ecommerce or something for another industry. Ideally, you should try to find tools built by people who know campaigns and know technology.
Is this tool off-the-shelf or proprietary?

Although ideally you’d get a tool made by a tech firm that is deeply familiar with campaigning, the truth is that Australia is too small a market, and the specialist tools are often not very good or they are very expensive.

Because of this, especially for smaller campaigns or unions, picking a “best in class” off-the-shelf tool may be a better choice than a custom tool. This is especially the case for website CMSs and email service providers, where tools like Drip [drip.com] and Wordpress offer features far superior to many so-called “specialised” tools like Nationbuilder.

Is this tool easy to use?

If no one uses your new tech tool, it’s a waste of time and money. The best tools aren’t always the ones that have the most advanced features, they’re the tools that actually get used. There’s no point in spending a fortune on a fancy campaign database if your organisers and campaigners still use Excel spreadsheets.

So avoid choosing a tech tool that’s hard to use and doesn’t have an intuitive user interface.
Campaign strategy

If you can’t create and secure support for your, and execute on a strong campaign strategy, then you’re unlikely to win.

But what does strategy mean? Strategy is a much over-rated term in my view. In fact, the vast majority of “strategy” is useless jargon at worst or “tactics” at best.

A strategy at is most simple is set of decisions that determine where limited resources are spent. The most effective strategies concentrate resources into a handful of impactful activities or areas.

An effective strategy is one that is easy for everyone in your campaign team, and more widely in the union, to understand, and to use as a guide on how to make decisions.

Who knows what your strategy is? Here’s a question for you: how many of your campaign team could describe in a sentence or two what your campaign strategy is? Could other union staff (organisers, industrial officers, office/support staff) describe your strategy? What about your delegates and activists? If they can, are they all describing the same strategy?

Priorities, not strategies

Most strategic plans and campaign strategies are junk. Does your campaign need a strategy? Probably not. Does your campaign need a clear, unambiguous “priority” (or “priorities”)? Probably yes.
What makes up an effective priority document? A campaign priority document, that fits on less than half a page, written in plain-English and jargon free.

Why do I say priorities, not strategies? Because the term “priorities” acknowledges that for your campaign team and other union staff, there will always be competing priorities.

Having a primary or overriding priority helps you and your campaign team, and your union’s leaders make decisions when faced with multiple competing priorities. Furthermore, it allows the decision-makers, leaders and other staff in your union weigh up their decisions and resource allocation with a simple judgement — does this help achieve the priority or not (or which of the competing multiple options would best help achieve the union’s overriding priority)?

Strategic plans rarely do this. In fact, they will often have multiple, competing objectives on equal footing that make decision-making difficult. Most campaign strategies rarely assist campaign staff in how to structure their work-week. (In fact, most strategic plans, once written, are shelved and never see the light of day.)

There’s two main ingredients to a good “priority”.

The “where to play” decision

What arenas will you be active in? What geographies? What industries? Which workers?
For example, if your priority is “growth”, you’ll want to clearly articulate who your members and potential members are and are not. If you’re running an electoral campaign, then the “where to play” decision would be about which electorates to focus on, to the exclusion of others.

For some union campaigns, this is very simple: the campaign may be focused on a single employer, or a group of employers.

The decision about where to play means making a sacrifice. You can’t be active everywhere or try to communicate and engage everyone. You’ll have to decide which worksites, which demographics, and which geographies get attention and just as importantly, which don’t.

The “how to win” decision

In a nutshell, this is the compelling thing (a reason, a unique capability, a promise, whatever) that means your union campaign can achieve what it’s going to do.

Again, with the example of growth as a priority, you need to clearly explain what is the compelling reason the workers you’re focusing on would join. This could be because of an industry campaign, bargaining, Union Shopper or whatever, but the point is, you need to be able to explain it simply, easily and in plain-English.

Similarly, an industrial campaign may have victory as achieving an enterprise agreement, or ending an employer lockout. The priority should help you make the decision on how you are going to win. For example, in the instance of the CUB dispute in 2016 involving the ETU, AMWU and others,
the “how to win” decision was a consumer boycott. This decision was internally clear, easily understood by allies, and created a single, shared goal for the movement.

It’s also worth stating explicitly: the two elements I describe can’t be developed on the fly, or without consideration or research. They rely on unions making the best use of their knowledge of their industries, the business and political environments, laws, the union’s own revenues and capabilities, etc.

**My “One Page Campaign Plan”**

Right at the start of your campaign, someone will need to write a campaign plan.

Putting something down on paper is critical. A written plan helps ensure there is a common, shared understanding of the key elements of the campaign, the resources required, and who will need to do what. Writing it down creates clarity, and should require you to be precise (rather than using jargon or unspecific and meaningless declarations).

Finally, a written plan ensures that the decision-makers understand and approve of the plan.
**Goals/Objectives**: This should state the one or two key priorities of your campaign in a sentence. Fulfilling this objective should result in you winning your campaign. They should
concisely describe the “where to play” and “how to win” decisions.

- **Main initiatives**: This is the heart of your plan. It should describe *how* you will achieve your objectives; what are the bold, decisive, impactful initiatives that will enable you to win. For example, if you are running an electoral campaign this is where you could summarise your initiative to recruit volunteers online for your off-line field efforts. If you are running an industrial campaign against company job cuts, you could include an initiative of pressuring the CEO and company board.

- **Tactics**: There are the specific actions, that should be directly linked to your initiatives. A lot of “strategies” confuse tactics for strategy. Your tactics are the *things that you do* to enact your initiatives and achieve your objectives. In this, you might have “Increase number of supporters in database”, which is linked to your initiative of “recruiting field volunteers”, and your objective of “convincing 1000 marginal seat voters to switch their vote”. How you implement the tactics (building landing pages, online advertising, conversion rate optimisation) doesn’t need to be in your plan.
Campaign basics

What are the campaign basics? In this section, I’ll talk about your campaign website as the hub of your online campaigning; your database (or CRM) is also important, as is your email tool.

Lead generation

The first goal of any digital campaign is to capture supporters’ contact details, especially their email address, but also phone number. The most effective campaigns are ones that obsess about capturing leads.

There is no shame to focusing on lead generation. Without new supporters being added to your database, you will struggle to get new members, new volunteers, new supporters, and awareness of your campaign will remain small.

A lot of this guide focuses on how to gain new supporters (called lead generation). In most cases, this will require spending money through advertising; at a minimum, if you’re not spending on Facebook and Google, you’re not taking digital campaigning seriously.

Nurturing new leads

Once a new supporter is on your email list or in your database, you should start to nurture them. Nurturing is a term that means to build a relationship with the new supporter, and prepare them to take action.
In most cases, this will be via email. As soon as a new supporter signs up, you should be sending them a custom series of automated welcome emails (see later in this guide for more about marketing automation). Most unions will now be familiar with new member journeys; your campaign supporters also need to be taken on a welcome journey, and it should start straight away.

Refer back to the engagement funnel. The objective of new lead nurturing is to move your new supporter down the engagement funnel, from following to endorsing, or endorsing to contributing.

**Landing pages**

Quite simply, landing pages are webpages on your campaign website that are specifically designed to capture a visitor’s information through some kind of action. Typically, you’ll use a web form (like a petition or email sign up) to get their information. A good landing page is targeted and designed for a specific kind of visitor – so the information it captures for your campaign ideally will be relevant and of high quality.

There are many good examples of landing pages. Take a look at many of the specialised donation pages on the website of a US presidential candidate, or the campaign pages on GetUp’s website. These are all designed to “convert” visitors into leads.

Typically there are no navigation elements, and they keep the explanatory text to a minimum. Similarly, the petition form is kept as short and brief as possible. Remember: every field you add to a form is another hurdle to action, reducing the likelihood that someone will fill it out.
Why are landing pages important?

Too many campaigns send emails, direct mail, social media traffic or online advertising to their campaign’s home page. This is almost always a missed opportunity, because you’re sending a targeted stream of visitors to a generic, untargeted page. When you send those people instead to a webpage that is specifically designed to be relevant to the visitors, you’ll increase the likelihood that they will convert into campaign leads.

For example, if you send an email to hundreds or thousands of members asking them to volunteer on your website, you’ll be far more effective if you send them to a page specifically designed for people to volunteer (e.g. a volunteer form and short amount of text explaining the benefits and commitments) than if you send them to your home page where the volunteer link is crowded by blogs, Facebook widgets, photos, and scores of other links.

In the first instance, you’re making it super simple for the potential volunteer to fill out that form. In the second instance, you’re making them have to wade through all your other online campaign material.

You won’t always need a landing page, but if your campaign does use them, you can make a big difference.

Campaign database

Your campaign database (customer relationship management or CRM) is where you keep the email address, phone number and other information about your supporters, members, donors and volunteers. The term
CRM is used in the corporate sector, and typically these databases have a range of built-in features designed for sales.

Your campaign CRM could be your union’s main membership database, but most unions’ membership databases are not designed for campaign use. Instead, you should try to use a specific campaign CRM that can integrate (if necessary) with your member database. Whatever CRM or database you use, it should integrate with the various other campaign tools you use.

Depending on the size of your campaign, you should consider whether you need a fully fledged CRM or a small one with just basic features. There are a range of simple CRMs available online (mostly designed for small business and sole-traders), but whatever you use, the days of keeping track of volunteers and activists using an Excel spreadsheet should be over.

Unions can get bogged down in examining expensive databases, and a whole bunch of software companies are out there trying to scam the union movement with promises of a one-platform system that does everything.

The truth is that in almost all cases, you should be platform agnostic and aim to use whatever tool is useful at the time, so long as it can integrate with your other tools. The Nationbuilder trap was tricking unions in to thinking they needed a single system for everything. The consequence of that was the union movement got trapped into using a system that could do everything really badly.

There’s no “best” CRM or email tool out there. There’s only tools that are useful for you right now. And for campaign purposes, you probably need
a system that is easy to use, rather than a system that has every feature under the sun.

**Content management**

Content management systems (CMS) are the programs that run the website. There are scores of content management systems that you could use for your campaign website.

Most complicated websites use a content management system to look after all the various pages and applications that a website may have.

Depending on your campaign, it’s worth considering if you need a fully-fledged CMS (like Expression Engine, Ghost or Wordpress), or just a system that can publish a few pages (like Leadpages, Unbounce or Instapage).

There are many free, open source content management systems available, most of which are supported by large contingents of (mostly volunteer) software developers. The two most well-known open source CMSs are WordPress and Drupal, but Expression Engine is also a highly regarded CMS.

In 2012 when this guide was first published, WordPress was used by 6 percent of all websites – now it’s over 50 percent of all websites. It receives regular security updates and new features, and there is a small army of programmers and designers who can provide almost any feature or design, either for free or for a small cost. WordPress is one of the simplest CMSs to install from scratch and start using straight away.
In this guide, I distinguish between your campaign website and your union’s website. Your union’s website is likely to need a fully-fledged CMS, and you should consider one of the many full-featured systems out there, including Wordpress, but also proprietary CMSs like Site Core (www.sitecore.net), Sitefinity (www.sitefinity.com) or Ghost (www.ghost.org). You could also look at the CMS operated by SalesForce (www.site.com).

When you’re setting up your campaign’s website however, you probably won’t need a full-featured site. Instead, a single specialised pagebuilder (like Unbounce or Leadpages) would probably do.
The eight core online campaign elements

The eight core elements of online campaign strategy are covered here. Each of these areas is a whole specialised field. For a large union or a big national campaign, you should ideally have specialised and dedicated staff who can focus on each element here. For a small campaign with limited resources, one person will likely need to be across all eight areas.

Email

Email remains the most effective online campaigning tool and communications channel. Despite the hype, email is a powerful tool that cannot be matched by social media or messaging apps.

Even in the age of social media, Facebook, and smart phone apps, email is by far the most used way that people use to send information — more than 94% of adults send or receive emails regularly, higher than everything else. Contrary to popular opinion, even young people use email, and in fact scroll through their inbox on a daily basis more than older generations.

Almost everyone who uses the Internet uses email. Emails, unlike websites or social media, allow campaigns to send our message right into their inbox — and because of this it can feel more important and personal. Because of this personalisation, email also has much higher engagement rates than social media.
Email campaigning is amongst the safest, cheapest form of mass communication out there. It can be deeply personal, highly engaging, and spur the recipient into doing amazing things for your campaign.

**Lead generation**

How do you build your email campaign list? The very first part of any campaign is building awareness, and then encouraging your audience to become active. This is where lead generation comes in.

There’s absolutely nothing wrong with building your list. Building a list of leads (typically email address and/or phone numbers) is a precursor to building awareness, then spurring people to take action. Without an audience to communicate with, you’ll struggle with any online campaigning.

In business jargon, a lead is generally used to describe potential customers. In a campaign sense, your leads are your potential members, volunteers, supporters and donors; you use your landing page to capture their contact details and email and social media to engage them.

“Leads” could be called a range of things by your campaign and in marketing literature, but whatever you call them, they are the people you are cultivating to do something for your campaign. You can categorise and engage your leads using the engagement funnel.

**Social media**

Social media is at maturity, with the vast majority of people in Australia now using Facebook on a daily or weekly basis. While new sites and tools
pop up all the time (Tik Tok, Dubsmash, Snapchat, etc), the main ones increasingly are Facebook, Twitter, Instagram and (increasingly) WeChat.

Over 2.4 billion people use Facebook every month, and in Australia it’s 17 million and growing. Youtube is a close second. Australia has the highest percapita usage of social media of any country.

Social media campaigning is a core part of online campaigning, but should not overshadow the more impactful (and “old school) tools, especially email, online advertising and content marketing. This guide focuses only on Facebook. Your campaign should make an assessment of whether it’s worth using Twitter, which has a fairly narrow (albeit, still large) user-base compared to Facebook, or other platforms like Pintrest, or Wechat.

**Organic Search (SEO)**

Organic search — commonly known as search engine optimisation (SEO) — is exceptionally important in ensuring your site can easily be found by potential supporters, voters and the media.

Research by Google (and a decade of experience) suggests that the vast majority of people do not click past the first page of search results, which is why it is important to consider SEO in your online campaign. If your campaign website is not on that first page, you’re effectively invisible.

There are a range of ways to optimise your website and to monitor the success of your efforts. At the most basic level, SEO is about lining up the text (called “copy”) of your website with the search terms people enter into Google (or other search engine) to find your page. The more the text
Often, beginning online campaigns will find that the keywords for their campaigns will be "owned" by other sites. This means that when you type in the name of your campaign in Google, your campaign’s website may not be the top site; instead a news website may have the top spot, or another organisation’s website may have that spot.

Search rankings change over time, and there is no instant way to improve your organic ranking (although you can use paid Google ads to get your website up the top of Google).

Almost every website content management system now has dedicated settings devoted to SEO, and once you move beyond the basics, it can get fiendishly technical, for example, how you structure data and schema on your site.

**Conversion optimisation**

Websites have two sources of traffic: paid and organic. Paid traffic is what it should like: people who you attract to your site through online advertising for example. Organic is from search engines and emails.

Because inbound paid traffic costs money, if your intended destination isn’t optimised for the visitors’ specific needs, you’ll end up losing a lot of those visitors and wasting scarce resources.

Conversion optimisation focuses on incremental improvements to conversion. Conversion, simply put, is the rate that people visiting your site
complete a particular task. This could include signing up for campaign emails, filling out a volunteer form, donating to the campaign or signing a petition. When a person does that action, they’re considered to have “converted”. Small improvements to your conversion rate can result in significant benefits for your campaign. These days, there are numerous tools available to help you make a range of minor changes to your website (optimisation) to improve conversion rates, such as changing button colours, button text, or altering photos.

**Analytics**

Understanding basic analytics will help you make decisions on more than guess-work and gut-feelings. Everything you do online is measurable and trackable, making it a lot more transparent than other types of campaign communications, such as traditional direct mail or TV/radio advertising.

A lot of powerful analytic tools are provided free by Google, but it can be a bit of work to get a handle on how in depth they can be. Like SEO, analytics can get very technical and complicated once you go beyond the basics.

The key to getting the most out of your analytics is to determine from the outset what the objectives of your site are. Your campaign website may have several goals: allow volunteers to sign up and solicit donations. Your analytics will let you see just how effective and successful your site is at doing those things. There are a whole range of free resources on how to set up goals in Google Analytics.
What to measure?

What should you be measuring to determine whether you are succeeding? This is a question that vexes online campaign professionals, and detailed debates still take place in forums and email lists.

While there’s no perfect answer to this, the simple answer is that the best metrics will change depending on how far your campaign has progressed.

Firstly, you should be aware of metrics that are meaningless (vanity metrics, see the box for more). Just because Google Analytics can measure everything doesn’t mean that every metric is meaningful.

Secondly, you need to think about what the top one or two real-world objectives for your campaign are. How does your campaign conceive of success beyond social media or the Internet? Because online campaign is only useful to the extent it supports winning in the real world, the most meaningful metrics online are those that have an offline impact.

Thirdly, a good metric is one that is actionable and helps future decision-making. Vanity metrics, like the number of social media followers, while good for the ego, neither helps win campaigns nor provides a guide for what to do next in your online campaign.

Vanity metrics: A vanity metric is something things like the number of Facebook likes, Twitter followers, page-views, email open-rate or raw number of people in your database. These numbers can almost always be manipulated to look positive but they provide no context for how successful you really are, and they are not related to real success.
So what should you measure? Again, this depends on what phase your campaign is in. Early on in your campaign, basic numbers like awareness and engagement is more important than later, when you want to turn that awareness into action. While the size of your supporter database by itself can be a vanity metric, having a growing list of supporters can be an important precursor to other important metrics, like volunteer recruitment or digital actions (like asking supporters to send emails to politicians). Here’s some more meaningful metrics:

- **Website bounce-rate, not page-views**: Page-views simply measures how many people have visited a page, but if no one takes any action or leaves the page after a few seconds, it’s not meaningful. Bounce-rate is the proportion of people who visit only a single page on your site (i.e. they don’t click further into your site). A low bounce-rate indicates that the visitors to your website are engaging with the actions on your pages. For example, if your main petition page has a low bounce rate, it indicates that a large proportion of page visitors are completing the petition.

- **Email click-through, not open rate**: Open rates for email are a reasonable metric to track the effectiveness of your subject lines, but don’t obsess about this. This is especially the case because subject-line tricks can get high open rates but at a cost of eroding trust with your supporters. A more meaningful number is the “click-through”. A high click-through means that the recipient has engaged with the content of the email and has decided to take action.

- **Repeat action-takers, not once-off actions**: The gold standard for many large campaign organisations is the number of people who take multiple online actions, not a single online
action. Your campaign database should be able to track the number of actions (petitions signed, number of donations, etc) your supporters take. A low proportion of supporters who take more than one action suggests low engagement.

**Content**

It doesn’t matter how technologically advanced your campaign tools are, if the content your campaign produces, for blogs, videos, memes, articles, reports, policy papers, social media updates, etc is uninteresting, irrelevant and dull, then you’ll find it harder to win.

Developing good, engaging and interesting content is a crucial part of online campaigning; it shouldn’t be an afterthought. Thinking about your campaign’s story, its narrative, and the building blocks that help tell it are all part of “content marketing”.

To give you an idea of how important content marketing is, consider two iconic “content” campaigns: Kony 2012 by the Invisible Children charity; and the Obama campaign.

The Kony 2012 campaign had a major content centre-piece: their video. The 30 minute video, which had the objective of reaching 500,000 college students, “went viral” because of the quality of their story-telling. In politics we talk about “narrative”. For online campaigning, this narrative needs to translate into interesting words (or images or video).

In the case of the Obama campaign, the campaign developed a wide array of video and blogging content. The videos in particular provided compelling, personal stories for people to view and to share.
Campaigning on the Internet is like campaigning in a thick fog. It’s very hard to have your message break through the haze of millions of websites, status updates and news stories. Good content helps break through.

**Online advertising**

Online advertising is the fastest and simplest way to get instant traffic to your site. However, doing it well is not easy.

Google Adwords, like so many Google tools, is a very powerful and finely grained resource, and can take a while to learn how to use effectively. The same applies to Facebook Ads, which is also easy and ubiquitous but can be difficult to get real value from.

Digital ads will be your best friend for fast-response actions, and allows you to quickly respond to events during the campaign.

The good thing about online advertising is that you are in control of your budget, you don’t need to spend a fortune, and can see quite clearly what effect your advertising is having. And there’s a range of free and paid tools that can help you automate a lot of the ad purchasing. There’s also a vast array of excellent free information and advice online for both Facebook and Google ads.

These days, a lot of campaigns are more familiar with Facebook advertising rather than Google Ads, but although the two platforms look different, they basically have the same features and functions.

Because advertising costs money, it is worth making sure you’re using tools that assist you spend that money effectively, for example
Adespresso ([adespresso.com](https://adespresso.com)) allows you to create both Facebook and Google ad campaigns with multivariate tests of different images/videos, text, links and the like, which also can integrate into various CRMs. Increasingly, email and marketing automation platforms like Mailchimp, Iterable ([iterable.com](https://iterable.com)), Autopilot ([autopilothq.com](https://autopilothq.com)) or Drip ([drip.com](https://drip.com)) are integrating into Facebook, allowing you to create custom audiences and even entire ad campaigns directly from the email platform.
Part 1

This guide is designed to take you over a few months of implementation, help you get used to the basics and move to more advanced online campaigning.

If you’re in a situation where you expect the campaign to be very short in duration, then you will need to compress your timeline and make some hard decisions about elements of online campaigning you won’t be able to do (your SEO and optimisation may suffer).

Setting up your online campaign

Getting started is often the hardest part of any campaign. Where do you start? Many campaigns struggle to move past the starting phases: registering your accounts and defining your campaign’s tone. I say struggle, because setting up a Facebook page is the start of your online campaign, not the end.

Starting up will be a busy time (and hopefully you’re not doing this during an actual election campaign). Ultimately, the sooner you get everything set up, the sooner you can start actually campaigning.

Email

Email is the “killer app” for online campaigning. Modern campaigns can use email databases to mobilise thousands, fundraise millions and recruit members to join or volunteer to make calls, knock on doors and attend
rallies. The great success of social action organisations like Get Up, Avaaz and even LabourStart is based around their email marketing: list building, segmentation, targeting, testing and tracking.

Modern online marketing is based on building large email lists and using a sophisticated mixture of analytics, multivariate testing and marketing automation. Modern email tools let you send highly customised, targeted messages to people based on their interests and past behaviour. Even systems like Mailchimp now allow basic marketing automation.

Email allows you to have a simple, direct call to action. You can engage the recipient, then ask them to do something. Having that call to action – join, volunteer, donate, buy, protest – is essential to effective email campaigns. You can see the success of the email in whether the people who open it do what you ask. An email without a strong call to action is wasted.

**Choose an email service provider**

Despite the desire your campaign may have to use a basic, low-cost option like Mailchimp, or a one-system-does-all option, like Nationbuilder, if want to get the most from your email campaigning, you’ll should invest in a more powerful platform that allows for marketing automation.

Marketing automation is a relatively new feature in digital software that allows you to create pre-set “if this, then that” automatic actions.

A basic marketing automation example would be: when someone fills out an online form saying they want to volunteer, the marketing automation system sends a “thank you” email to the new volunteer, and a notification to the organiser or campaigner telling them someone has offered to volunteer.
More advanced marketing automation systems integrate with CRMs and CMSs; to continue the example, when someone fills out a volunteer form, the automated system sends a series of timed emails (drip-feeding the emails every few days) to introduce the new volunteer to the union and the campaign; and in addition to sending a notification email to the organiser, the automation system also adds a reminder in the organiser’s calendar to call the new volunteer to arrange an induction. The system could also send an SMS alert or thankyou to the volunteer, and even generate mail-merged Word documents to be printed and mailed in the post.

A basic email service, like Mailchimp can perform some of the basic features you’d expect: A/B testing of subject lines, basic automation, deliverability and spam compliance, but compared to some of the other tools that are available, they’re limited.

Having said that, if you’re not familiar with email campaigning, I’d suggest starting with a tool like Mailchimp, but there’s numerous alternatives available (some of which are cheaper, or have better features) such as MailerLite (mailerlite.com) or Convertkit (convertkit.com).

For larger campaigns or for campaigners who want more advanced features, you may want to look at tools like Iterable (Iterable.com), Autopilot (autopilothq.com) or Act-On (act-on.com).

It’s important to note that there’s no “best” email system, but there are “bad” systems. Systems that prevent you from exporting your data, or that don’t integrate at all or easily with other online tools are “bad”. Email tools that don’t take deliverability seriously are also “bad”.

Email deliverability is when the email you send actually arrives in someone’s inbox. This is an issue because some email services can routinely get
your emails landing in someone's spam folder, or get blocked by firewalls at your members' workplaces. Deliverability is determined by your email sender reputation, which is determined by the major internet companies like Telstra, Google or Yahoo. Your score is determined by a number of factors, such as how many emails you send, your complaint rates, your bounce rates, how many times you've landed in the spam folder, how many inactive/old addresses you have and more. A bad email service provider doesn't care about this or doesn't assist you in improving your deliverability, and that could prevent your emails from making it to the inbox.

So, deliverability is different to delivery (whether or not an email is rejected or not, bounces or has an error, due to the recipient).

**Should you use a graphic email template?**

Most email services like Mailchimp will allow you to use a graphic template for your emails. However, should you use one?

For campaign emails, there's a growing body of evidence that suggests you shouldn’t. Since at least the 2008 US elections, most campaign organisations (especially major presidential campaigns) find that emails which look like plain, ordinary text-based emails, out perform graphic emails.

In fact, the most effective emails increasingly are ones that look like they’re an email sent to you by a friend. Whereas graphic designed emails end up in spam or “promotions” folders, plain non-graphic emails can avoid those filters. Furthermore, graphic emails often include elements that distract the reader from the message and the call-to-action.
Text-based emails are also more readable on mobile devices; and increasingly, email (and social media and websites) are all consumed on mobile phones. On a mobile, images are hard to see, and can be moved, reshaped or even blocked.

For example, the screenshot here is of an email from the Democratic National Committee. It is a simple text-based email with a plain logo as the only graphic. There's no fancy formatting or graphic design, so the focus is on the text and the call-to-action.

Way back in 2008, the Obama campaign experimented with fancy graphic emails vs text-based emails. They found that the text emails always outperformed the graphic designed emails. In the decade that followed, almost all digital campaigns have found the same thing.
How to write a campaign email

When it comes to writing an email, recent data tells us that readers are spending only around 13 seconds reading. This tells us that you have a very short amount of time to get your message across and get them to engage with your call to action.

The second element in writing effective campaign emails is that email services like Gmail, Yahoo and Outlook are increasingly looking at engagement like clicks, rather than just open-rate, to determine whether your email is delivered or sent to the promotion or spam folders.

So here’s the current best practice on writing campaign emails:

- Your opening sentence should explain the purpose of your email, so anyone reading it grasps the issue in five seconds or so.
- Include your call-to-action link at the top of your email (e.g. the second paragraph). If you don’t have a link at the top of your email, you’re missing out on conversions.
- Include only a single call-to-action, and repeat the call-to-action multiple times throughout the email. Having multiple calls-to-action significantly reduces the likelihood that the reader will do any of them.
- Re-state your call-to-action (with a link) as a “P.S.” at the end of the email.

There’s no specific recommendation on length of the email. Generally, older readers like longer emails, younger readers like shorter ones. People with reading difficulties also prefer shorter emails. Regardless of whether the email is long or short, include the call-to-action early.
Social media

Choosing your platforms

Which social networks should you jump on? I recommend the following:

- **Facebook**: as the largest social network in the world, Facebook is nearly ubiquitous. Facebook is constantly changing, which makes it difficult for campaigns to stay on top of different features and options. However, Facebook in its current form emphasises paid advertising for pages, with organic (unpaid) views through Groups. This changes all the time, so the main advice is that your union should have a presence on Facebook, but the “best practice” may be “bad practice” in a few months.

- **Youtube**: Youtube is the second largest social media network in Australia (and the world), not to mention that it’s the second largest search engine (after Google). There are many features for campaigns, and you’ll be able to re-use your video content from Facebook. Like Facebook, there is a lot of good, free advice on best-practice for Youtube.

- **Instagram**: With a strong focus on visual content, Instagram can be a great platform to showcase the great photos or videos of your campaign. It also has the benefit of having a younger audience than Facebook (which owns Instagram). As far as campaign utility though, Instagram is being used by political and advocacy groups mainly for “branding”, rather than action-focused campaigning.
• **Twitter**: the utility of Twitter as a campaign tool is debatable, but it is useful for campaigns that have a lot of traditional media engagement. Most journalists are still active on Twitter, as are most politicians, which means you can interact and target them. However, the demographics of Twitter are fairly narrow.

• **Others**: There are literally hundreds of social networks; what about LinkedIn, WeChat, Tik Tok, or Whatsapp? Your campaign will need to make a judgement on these social networks. In most cases though, in my view you should focus on Facebook.

It is worth for example discussing whether or not to create a new campaign Facebook page that is separate from your union’s main page. If your union already has a number of Facebook pages, it may be desirable to have a page specifically for each campaign. However, changes to social media algorithms means that it becomes harder and harder to get “organic” (unpaid) reach. In short, small Facebook pages or Twitter accounts typically don’t show up in the newsfeeds of your supporters. Consequently, you may want to not create new social media pages or accounts for your campaign.

**Your campaign’s tone**

Your campaign’s content is the important part of your campaign: it’s what your campaign’s various social media accounts will talk about. It is shared through your blog, your emails and social media accounts.

Right at the start of your campaign, you’ll want to think about what you want to talk about and share. Your choice will determine a lot of other things, such as the frequency of your updates and the content itself.
Some unions have developed very distinctive “voices” on social media, for example the AMWU’s irreverent Facebook and Twitter accounts.

Increasingly, union leaders are developing distinctive online voices and styles also. If your union’s leadership is comfortable with digital tools and communication, then it may also be worth considering how their posts will influence the campaign’s tone, especially if the union’s main campaign accounts are sharing posts from the union leader’s account.

When thinking about your social media accounts, you’ll also need to consider how you’ll deal with external content. There is a lot of content out there to share. The ACTU (and other peak union councils) and other unions produce their own blogs, media releases, videos, ads and policy documents. How will you approach these?

- **Campaign only**: Your campaign social media accounts only share things produced by the campaign itself.
- **Curators**: Your campaign brings together a selected group of other sources, such as the ACTU/TLCs and favourable news articles. Tools like Google Alerts help you collate those resources and share the gathered content.
- **Chatterbox**: for campaigns who are more comfortable with social media, this social media style involves lots of conversation with other social media users. It is far more personal and interactive, but obviously more time consuming.

**What’s your style?** What worked for someone you’d like to emulate? You can’t fake authenticity, but it helps to define your intentions a little before you start pushing your campaign on social media. At the end of the day, it’s best to try to be as natural as possible.
Social media policy tip: Decide early on your campaign’s policy on the social media of campaign and union staff. Your opponents and the media will be looking for any chance to pull your campaign up for an errant tweet or status update that could damage the union. There are benefits with union staff tweeting on their own accounts, so don’t automatically assume everyone should be locked down.

Lead generation

Gather emails

As I’ve written before, email is the “killer app” for online campaigning. Leads are the email addresses of people interested in your campaign: potential volunteers and donors. These are the largely the people your union will be communicating with during the campaign.

GETTING THE LEAD

The purpose of gathering email addresses (leads) is to communicate with them and ultimately encourage them to participate or support your campaign in the real world. If you think back to the funnel earlier in this guide, you want to turn the Observers into Followers, and to do that, you need to get their contact details.

This is also where your traditional on-the-ground campaigning activities can help. Are you holding workplace or community stalls? Include a contact sheet and ask for peoples’ email addresses. Are you door-knocking? Ask for the email addresses of potential supporters. Do you have a campaign office? Ask for the contact details of people visit the office or call in.
Every real-world interaction with someone is an opportunity to get their email address or other contact details.

There’s no point in being shy. Without their contact details, you can’t encourage someone to support your campaign, you can’t ask them to volunteer, join your union, or attend a rally. There’s absolutely no shame in “list building”, because without a list of email addresses, you’re only talking to yourself.

Remember, if you don’t ask, you don’t get. No one will give you their contact details unless you ask for them.

EXIT INTENT AND POP-UPS

Have you visited a website and been about to leave only for a popup to appear offering you a discount? In the world of online ecommerce, pop-ups are a standard marketing tool that significantly improve lead generation and sales. It’s time for union campaigns to start using these tools.

Exit intent popups are a graphic overlay that appear when the visitor to your website is about to leave the site. They use tracking codes on your site to detect the movement of the mouse cursor. The popup is a last-dash opportunity to attempt to engage the visitor, which is why ecommerce sites typically offer a discount.

However, there’s lots of different types of exit intent popups and overlay popups, for example scroll-based popups and time-based popups.
The point of using these tools is to give a compelling reason for the website visitor to engage with the campaign. For example, the image on this page shows a scroll-based popup that I created for our We Are Union website. This particular popup has a secondary message when you click on “find out more”. With a conversion rate of 6.5 percent, it performs better than most Facebook or Google advertising in getting leads.

The good news is that whereas a few years ago they were expensive and technical to install, now they’re simple, easy and inexpensive. Popup services like Convertflow (convertflow.com) and Optin Monster (optin-monster.com) give you cutting edge lead generation tools cheaply and they’re easy for non-technical people to use.
Finally, the link between gaining new leads and having marketing automation capabilities is important. Simply put, you should be able to automatically email and welcome the people who sign up to get information about your campaign. More and more unions are investing in member welcome journeys, so remember to have welcome journeys for the supporters of your campaigns.

**Organic search (SEO)**

**Set up your Google Webmaster tools**

The free Google Webmaster Tools (google.com/webmasters) provides you with a number of tools that support your website, such as reports about your website pages’ visibility on Google or errors. It’ll tell you whether your site is appearing in Google’s search engine results and offer some (basic) tips on how to improve things. If you’re using a widely used CMS like Wordpress, there’s loads of free (and paid) plugins and services that can help with more technical SEO.

**Decide your campaign’s primary search keywords**

Search engine optimisation (SEO) is a massive topic that it outside the scope a short introduction like this one. What I’ll try to do is keep give you an overview that is simple enough to get you started. If your campaign has the budget, then you should definitely contract a specialist firm — and there are plenty that are reputable “Google partners”.

To get started, you need to think about your core keywords.
Keywords (or key phrases) are what the main search terms that you will want your union website to appear at the top of a Google search. To achieve this, you’ll need to optimise your website and landing pages for these keywords, and by doing this, you make it more likely that people searching for those terms will find your campaign.

There are two components to this phase: optimising your website and landing pages for those keywords, and getting inbound links to your website with link anchor text matching (or related to) those keywords.

The thing to keep in mind is that when you create a new campaign website or page, the page probably won’t rank well with your chosen words for a while. Even a Google search for your campaign’s slogan or name is more likely to show up news articles about them in the top spots rather than your campaign website.

Another thing to keep in mind is to not aim to rank highly for highly contested keywords, especially where there’s well funded companies competing (this is a problem for almost all search terms related to workers compensation for example). If you’re a major campaign or have the budget, you may want to engage an SEO specialist agency.

**Analytics**

**Set up with Google Analytics**

The first task to get on top of your analytics, sign up for a free Google Analytics account. There are paid services, but unless you’re running the main Labor digital campaign, you’ll do fine with Google’s service. Just visit [www.google.com/analytics](http://www.google.com/analytics). You’ll need to install the analytics code on your website, and most CMSs will make this fairly easy to do.
Ethics of data collection: There’s no doubt that unregulated surveillance capitalism is an enormous risk to civil society, democracy and freedoms. Unions should definitely be involved in the discussion about the ethical use of data, and the regulation of data companies like Google, Facebook and the various second-party data companies.

Each union should decide for itself how it proposes to use and collect data about its members and supporters. As academic Panka Mehta wrote, “to realise the potentially amazing benefits of big data, we must fight against the undemocratic forces that seek to turn it into a tool of commodification and oppression.”

Establish your conversion goals and funnels

This is where you start to get a bit more technical with your analytics. Conversion goals are the actions you want site visitors to take. Some examples of conversion goals are:

- Email subscriptions
- File downloads (e.g. delegate kits or reports)
- Donations
- Completed forms (e.g. community surveys or volunteer sign up forms)

Make a list of all the things you’d like to track visitors doing. Then set up those goals in your Google Analytics account. The way that actions are based is through a sequence of steps, known generally as a “funnel” (hence the engagement funnel).
There are literally hundreds of Youtube videos on how to set up your Google Analytics funnel, so head over there for details. Your website designer should also be able to help you set up a funnel correctly.

Once you have your goals and funnels set up, you can add them to your dashboard for easy access (discussed later on).

**Annotate your Google Analytics**

Periodically, your website will get traffic spikes. A controversial media release, major press coverage, a large event or email campaign will all cause higher than usual traffic. You can use Google Analytics to add an annotation so you can remember the reason for the surge at a future point. This is good for historical tracking, but also to dig deeper during these spikes helps point to things you can do next time to recreate these spikes.

**Analytics tip**: Adding these annotations helps tell the story of your campaign to decision makers. It is also useful if you have any kind of reporting requirements to the campaign, as they help you remember what caused spikes.

**Content**

**Start a blog**

Writing about blogging in 2020 seems very quaint, but the truth is that campaign or union blogs remain one of the best ways to get your campaign site visible on Google and to engage future supporters or members. Creating a campaign blog provides the following benefits:
It gives you something to talk about and share on social media and email;

It allows you to re-use successful content that you’ve used somewhere else, for example a campaign video or meme can be republished on your blog;

It keeps visitors on your site longer, which means they’re more likely to be engaged with your campaign.

It allows you to be transparent with your campaign supporters and build trust between your campaign and your supporters;

It keeps your campaign site “fresh” for search engines, and site visitors. There’s nothing worse than a site that hasn’t been updated in months (and the Google search rank penalises sites that aren’t updated often);

It provides a good base for your search marketing, for example by creating more indexed pages, search engines rank sites as more credible and trustworthy (although this isn’t the only consideration for credibility that search engines use);

It gives you opportunities for internal linking. This means linking to other parts of your website, especially ones that are designed to convert visitors (e.g. into members or volunteers). Search engines also like internal links.

Depending on what content management system you’re using, you should be able to easily set up a blog, in fact almost every CMS should let you let you create blogs really easily.
**Blogging tip:** Blog from the start of the campaign, don’t wait until the campaign has officially launched. Starting from day one really boosts your SEO and should help build interest in your campaign. You should make sure to use your SEO key words in your blog posts. A good tip is to turn campaign “frequently asked questions” into blog posts, which will give you more opportunities to rank in search engines and get supporters to visit your site.
Part 2

Plan, build, grow and communicate

This is where you really start planning properly. Ideally you’ve done the set up, so now’s the time to start to focus on developing your automated supporter journeys and engagement plans, building your SEO, set up some proper reporting for your campaign, and continuing to engage your social media following.

Email

Set up your marketing automation

Your leads are potential supporters. However, not all of them are ready to commit to supporting your campaign when they first sign up to your email list. Often it could take several interactions before someone is ready to become active, to join or to donate money. The reasons for hesitancy could be for any number of reasons: the timing of the ask, lack of information, a cluttered inbox or lack of time.

What you want to aim for is to get and keep your campaign at “top of mind” of those leads. This will mean that when the time is right, the lead will respond favourably to your campaign emails.

As I explained earlier in this guide, marketing automation allows you to pre-set a range of actions to take place based on specific triggers, and
depending on the tool you’re using, this can happen across your email service, website, social media and even SMS.

With marketing automation, your campaign can target supporters or potential members with automated messages across email, web, social, and SMS. Messages are sent automatically, according to sets of instructions (these have a lot of different names, e.g. journeys, workflows, automations, rules, etc). Workflows may be defined by templates, custom-built from scratch, or modified mid-campaign to achieve better results.

Marketing automation lets you implement a digital campaign plan without having to manually press “send” on each and every email, message, or post you create. A good marketing automation tool will let you identify your audience, design the right content, and automatically trigger actions based on schedule, segments and behaviour. Once your campaign rolls out, you can focus on other tasks, then analyse and tweak your communications, content or targeting as results start coming in.

For example, someone who signs up on the volunteer registration form could receive a series of automatically sent emails aimed at motivating the person to turn up at a campaign event like a phone-bank to actually volunteer. The automatic message could be sent instantly — when someone signs up to your list — or a week after with a personal note from the union’s secretary. As noted earlier, the usefulness of marketing automation is that you set them up once and then you don’t need to worry about logging in and sending them manually. They can be set up to be sent late at night, on weekends, first thing in the morning or even weeks and months later.
USING MARKETING AUTOMATION FOR RETENTION

Once you’ve converted someone into a supporter, volunteer or donor, you’ll want to keep them. This is where retention comes in. Your aim is to maintain a lasting relationship with your new supporters.

The benefit of using a marketing automation service is that you can see what works to engage your supporters — through open and click through rates. You can experiment, with the frequency of your emails and the types of content you’re sending them. And you can see which messages resonate strongly through A/B testing.

If your email service provider doesn’t have even basic marketing automation features, then you should definitely consider switching to a new one. I’ve provided a range of suggestions earlier in this guide. The lack of even the most basic marketing automation is one of the abject failures of Nationbuilder. Nationbuilder lacks even the ability to send a basic email sequence beyond a single automated email response.

Of course, the more active and engaged a person becomes, the more your engagement with them will focus on off-line channels: phone calls and personal visits. Your mass automated emails will be less useful.
Social media

Build a following

Social media is not a silver bullet and you can’t magically build a following over-night. Your campaign will gain followers by doing a few simple things:

- Fill out all the various details and information on your Facebook page;
- Create engaging content that your followers actually want to share;
- Post regularly, 4-6 times per day, or more if you have content to share;
- Directly email your existing supporters and ask them to like or follow your campaign on Facebook or Twitter;
- Ask your union staff to invite their friends to like or follow your campaign page or account;
- Use the “invite” feature on Facebook; when someone who is not already a fan of your page likes it, there’s a feature that lets you invite them to like your page.

If your campaign has also chosen to use Instagram, then the steps you take for Facebook can have a flow-on benefit for Instagram.
How often should you post? There’s no magic for how frequently you should post to Facebook or Twitter. There’s lots of opinions online among the experts, and the truth is that you can probably post a lot more than you think.

Because Facebook changes the way its algorithms work, “best practice” changes all the time, and whether or not a particular post, video or photo gets a lot of views, shares or likes is very dependent on the quality of the content, not the frequency of your posting.

If you have a budget, consider promoting your posts automatically. If you don’t have a lot of time, then unfortunately paying is one of the best ways to build a following and get your message out there (this is the business model for Facebook, who has changed their algorithm to suppress organic reach for pages).

Most Facebook ad automation tools like AdEspresso let you set up an automatic boost for your posts. Set this up to promote every post for at least one day for around $5 per post. The benefit of doing this is that it lets you see what posts have good engagement (i.e. low cost engagement) and secondly it will let you “invite” people to like your page (at a much lower cost than running a paid campaign promoting your page to get likes).
Facebook custom audiences: Custom audiences are a powerful tool, but only if you’re advertising.

There’s two types of custom audiences: existing supporters, and lookalikes.

Creating either requires that you upload a list of existing supporters, members or customers. This allows you to target advertising specifically and only at people you already have in your database. A lookalike custom audience uses your uploaded data to “match” to other people on the platform (creating a “lookalike”). You can’t access the lookalike data directly, only through the ads.

There is a vast amount of free information and advice on how to effectively use custom audiences for advertising.

Search engine optimisation

Plan your website for search

Ideally you will have a campaign blog. The campaign blog is where you write about campaign events, news and photos, profiles of supporters or members — in short, everything you publish in the campaign should be also published on your blog. In addition to being important content for social sharing, blogs are exceptionally useful for search engine optimisation — Google and other search engines love blogs.

When you set up your blog, keep in mind the important campaign keywords that you chose earlier. I’ve already discussed content management systems, and most CMSs let you easily create blogs.
Use Google’s SEO tools to track your progress

Google has a whole range of free, tools to help you monitor your search engine optimisation. There are also a lot of paid services out there, and if you’re ready to take SEO to that level, I strongly suggest hiring a professional. Alternatively, your union’s national office may be able to assist, and ideally, the ACTU will eventually provide this for all unions.

Here are several Google tools that you should look at for SEO and keyword research:

- **Google Webmasters Tools**: [www.google.com/webmasters/](http://www.google.com/webmasters/) Google Webmasters helps you identify broken links, malware and other issues and find out what search queries lead to your pages even with clickthrough statistics. It even checks your website speed and tells you why it’s too slow.
• **Google Website Optimizer: optimize.google.com**  With Google Optimize you can test different versions of your pages, running A/B tests and multivariat tests. This is especially useful for campaigns with a lot of website traffic (but is less useful if you’re only getting a few hundred visitors per month).

• **Google Trends: www.google.com/trends**  Google Trends lets you compare traffic for popular search terms and websites. This way you can determine the comparative popularity of your campaign issue (note that some keywords won’t have sufficient traffic to rate).

While using these tools remember to take the numbers with a grain of salt. They are never completely accurate but in many cases they are the best numbers you can expect for free. What’s more, a lot of useful tools that were standalone products are now integrated into either Google Analytics or Google Adwords.

## Analytics

### Custom reports for Google Analytics

Google Analytics is a powerful but complex tool.

Most campaigners don’t have time to spend hours digging into their data and typically only require a few key metrics for their reporting needs. The first step here is to figure out what you want to report on — pick the top 3-5 metrics that will help you understand what is going on for your digital campaign. This could include list growth or email signups, donations, volunteer enquiries or new member joins — as well as basic reports on your organic site traffic (excluding paid search ads).
The important part here is to add the report to your dashboard, this saves the setup and structure of your report “query” so that you can access the data from one overview screen whenever you need to produce a report for campaign planning meetings.

If your website was developed by a professional design agency, ask them for help in setting up a few reports for you. If you want to do it yourself, there are hundreds of Youtube tutorial videos just a search away.

**Content marketing**

**Set up a content calendar**

One of the biggest challenges for social media and digital campaigning is having a steady stream of content to share. It can be easy to neglect your Facebook page or blog for a week or two, especially if you’re not only responsible only for online campaigning but also coordinating volunteers or organising events.

A key to successful content marketing is to have an editorial calendar. This helps keep you accountable, organise your schedule and make sure you actually prioritise updating all those accounts. You’d be surprised at how much time this can take! (There is a falacy that social media is free, but it actually has a high cost in time to update all those accounts.)

Here are some examples of things to consider when drawing up your calendar.

- Write one weekly blog post for your campaign’s blog (that’s not a media release);
- Spend time on Facebook replying to comments, and on Twitter responding to tweets;
- Define some post-types that are easy to produce on a recurring basis — for example, a monthly roundup of interesting links relating to your campaign or union.

**Scheduling tip:** Remember to use tools like Hootsuite ([hootsuite.com](http://hootsuite.com)) or Buffer ([buffer.com](http://buffer.com)) to line updates to social media posts for several days or weeks in advance. Your CMS should also allow you to schedule posts or articles.

Your main social media accounts should be updated several times per day, around 4-6 times. To achieve this, you should consider giving multiple people in your union office the ability to post to the account. Facebook has fairly good admin/editor permission settings for pages. So long as all the people posting have a clear understanding of what’s acceptable, you should be able to reduce any risks of problems.
Part 3

Optimising your digital campaign

Part 3 introduces the concept of conversion rate optimisation. We do this by looking at the main or important pages on your website (like your join page, or your volunteer page) and developing a single call to action. We also want to start creating great landing pages for your paid advertising. Finally, we want try to improve your website page loading time.

Email

Segment and create groups/lists

Segmentation is what makes online communications — and email particularly — a powerful and effective campaigning tool. Segmentation is all about targeting your audiences with communication that is relevant to them. Not all of your members, supporters, volunteers or donors will be the same. They will have different preferences, time commitments, and interests.

The engagement funnel is a useful framework for thinking about how to segment your campaign database based on how interested they are in your campaign. However, there are other ways to cut up your list.

Your marketing automation or email service provider should allow you create segments based on tags, custom fields and events. The kind of segmentation then depends on the data you have recorded, for example,
the suburb, postcode, gender, occupation or ages are all ways to segment. Similarly, you can segment based on behaviour, for example, if they’ve visited a specific page, donated or volunteered. There’s more detail on segmentation in Part 6.

Given the complexity of this subject and the fact that this is an introductory guide, I won’t go into too much detail about segmentation. The best starting approach to segment based on your engagement funnel, then by action (if you can track it) and by demographics. Micro-segmentation where you start to get segments of just a few hundred people is unlikely to be useful for mass-communications (although it is obviously the right size for your volunteer lists).

**Social media**

**Time and schedule your updates**

I foreshadowed this earlier: there are some great tools out there to help you schedule social media updates, e.g. HootSuite and Buffer. Use your analytics from these tools and from the Facebook page insights page to determine when your potential members, supporters and constituents are most active online, and schedule your social updates accordingly. Facebook in particular will give you detailed information about what days and times your page fans are most active or logged in.

For example, many of your activists and volunteers may be students, who regularly check social networks during the day, whereas your donors may be older and are online in the evening after work.
Because people check social media regularly and multiple times throughout the day, it’s worth posting more than once a day to your account pages.

**Lead generation**

**Answer questions online**

I’ll only briefly touch on this, because most campaigns probably won’t have enough resources to spend a lot of time doing this.

It goes without saying that online conversations about your campaign are likely taking place without your knowledge. Google Alerts can help you find them — but you should also take a look at issues related to your campaign but not directly related. For example, local schools, planning decisions, public transport, funding decisions by government, investment decisions by business, court cases and the like. When you find these sites/blogs and forums or Facebook groups, spend a bit of time getting involved with that community and address those issues. Leave comments and engage in a (polite) dialogue.

The point of this is to raise awareness of your campaign, and encourage people to engage with it. By answering people’s questions or by asking the questions, you can turn someone reading that interaction into a potential campaign lead. By including the campaign website (ideally leading to a landing page) in your comment or forum profile, people can follow that back to your site and that will give you a chance to capture their contact details.

By engaging in these discussions where they’re already taking place, you can establish your campaign’s bonafides on those issues. Sites to
specifically look for include Facebook groups, Reddit, and the Whirlpool forums.

You’ll need to have an internal discussion about who’s name the comments are left under: the general union’s name, a union staff member’s or someone else. There’s no right answer, but be aware of the risks of both.

**Conversion rate optimisation**

**A single call-to-action for each page**

Fundamental to digital campaigning success is the idea of landing pages which have only one objective and a single call-to-action. Whether it’s to encourage someone to become a member, sign up as a volunteer, or make a donation, by only having a single goal for each page, you help visitors complete that goal and make it easier for your campaign to measure success.

It is blindingly obvious that if you have a page with thirty different buttons, links, and menus, visitors will stray or become confused. This is why landing pages were invented: to have one goal and one call-to-action.

**Landing page tip:** Print out your landing page and then pin it to your office wall. Standing back a few paces, is it clear what the desired interaction is? Ask someone else in the campaign office. Is it too complicated? Is the call to action clear?
CHECK YOUR CAMPAIGN'S INBOUND LINKS

Take a look at all the inbound links you have control over (your Twitter profile page, email campaigns, paid search ads) and check where you’re sending people. If you’re sending them to your homepage, ask whether it would make more sense to send them to a specific landing page. If you’re sending them to a landing page, ask whether that page has only one purpose and one call to action.

**Design everything for mobile.** A few years ago, smartphones were still relatively rare. Today, and in the future, websites and emails should be designed for mobile devices first, desktops second.

What this means is that your websites and emails should be easily readable on a smart phone. Most CMSs and email platforms allow you to easily create responsive designs (that is, the design automatically adapts to the screen-size).

**Check your page speed**

Page speed is the concept of how fast your page loads in someone’s browser. The faster the better.

How fast your page loads, on desktop computers or mobiles, affects a whole bunch of things. For example, Google now prioritises fast-loading pages in its search results. Slow loading pages are more likely to result in someone closing the page rather than waiting for it to load.

There’s a lot of free page speed checking tools, e.g. Google Page Speed Insights ([developers.google.com/speed/pagespeed/insights](http://developers.google.com/speed/pagespeed/insights)).
GTMetrix ([gtmetrix.com](http://gtmetrix.com)) or Pingdom ([tools.pingdom.com](http://tools.pingdom.com)). Each of them will give you some basic tips on how to improve your page speed, but it can also start to get very technical. Past a certain point, you may need to get professional assistance.

**Content marketing**

**Create an incentive**

The idea of this tactic is to encourage people to engage with your campaign, ideally by giving you their contact details (an email, address or phone number), in exchange for something.

Most campaigns will have some kind of campaign collateral — like t-shirts, stickers, coreflutes or goodies for fundraisers. These can be lead generation gold. Unions regularly give away t-shirts or stickers. Now consider combining this with your lead generation.

Consider the major US presidential campaigns: they sell branded t-shirt, stickers and badges, and they are sold at near cost because the information — the email and mail addresses — were just as important as the cash. The US presidential campaigns also use opportunities to meet the candidate, e.g. as a dinner or coffee, as an incentive. Sometimes this is in exchange for a donation, but other times its just a free entry sweepstake. Again, the cash wasn’t the point; the contact details (leads) were.

For a union campaign, where fundraising may not be the objective, giving away stickers or other inexpensive union goodies can be an effective way of encouraging people to take the first step of engaging with the campaign or volunteering.
Putting up one of your campaign goodies on offer to people who sign up — to your email updates, or as a volunteer — should help get you extra leads. I’d suggest not starting with your most valuable campaign goodie, but run a few experiments. Run a series of offers and experiment with different campaign items. Will people respond best to stickers, tshirts or something else?

**Advertising**

**Set up your online advertising accounts**

Unless you are really into keyword lists, the prospect of running Google Ads is unlikely to excite you. However, online advertising (both Google and Facebook, which for now are the only ones it’s probably worth considering) are a really easy, simple and inexpensive way to promote your campaign.

**What about Twitter advertising?** In a nutshell, it’s unlikely to be worth advertising on Twitter. In addition to Twitter’s decision to ban “political” ads, there’s also the issue that Twitter has one of the worst response rates for advertising.

Here are just a few reasons why Facebook and Google ads are an essential tool for winning your online campaign:

- **Audience size:** Facebook is used by 15+ million Australians and half of the Australian population logs in every day, most of which are mobile devices. Google is used by around 95 percent of internet users for search.
- **Attention**: People are spending more and more time on Facebook. For example, the average user spends about 50 minutes just on Facebook, Instagram, and Messenger every day. This increases when you include Youtube.

- **Pay to play**: Due to aggressive moves to increase revenues and force organisations to advertise, your Facebook page updates are increasingly being suppressed. This means that your “organic” reach will be low and remain low, and unfortunately to get your message out now on Facebook you need to pay.

- **Targeting**: The targeting options within Google and Facebook Ads is very detailed (albeit less detailed now compared to the pre-Cambridge Analytica scandal). You can target users by location, demographics, age, gender, interests, behavior, and much more.

There are a vast number of resources available for setting up Google Ad and Facebook Ad accounts, and I encourage you to refer to those, e.g. the free guides available from Buffer or Adespresso.

The thing to keep in mind about online advertising is that you can set your own budget. The amount of traffic you can bring in is linked to how much you’re willing to pay. You can set your budget to whatever amount you want, based on a total campaign spend, or a daily budget. You can increase or decrease it as you wish.

**SEND TRAFFIC TO A LANDING PAGE, NOT YOUR HOME PAGE**

This is important enough to repeat. The reason you’re running paid advertising is to turn traffic into campaign leads. Sending this traffic to your homepage will mean that you will waste the majority of the money you spend.
You’ve probably spent a lot of time and money on your homepage — but it is really like the storefront for your campaign. Paid advertising lets you send people directly to the product they’re interested in (i.e. the landing page).

**How important is Facebook advertising?** The answer is that advertising on Facebook is probably a lot more important than you think.

In recent years, progressive campaigns have been utterly overwhelmed by conservatives when it comes to digital campaigning, and Facebook advertising is the main tool that conservative campaigns are using to win. Advertising on Facebook (and Google to a lesser extent) should now be prioritised above all other types of paid promotions in my view.

In particular, Facebook advertising is increasingly useful at building awareness, and getting people to do do something (e.g. join, donate, provide their email). This means you’re typically advertising to people likely to already be sympathetic to your cause.

However, Facebook ads are not a useful tool for persuading people.
Part 4

Acquire, measure, rate, attract

This part of the guide will focus on how to start to incrementally improve your online campaign tools, your website, Facebook and a bit more about online advertising.

You’ll want to convert your leads — your supporters and volunteers — into fans. We’ll look at your analytics to identify and improve the weakest parts of your website. We’ll also look at free and paid traffic and try to get you more useful campaign leads.

Social media

Review your Facebook page

By now, you should be aware of the various tools available for Page managers. These are mostly available from business.facebook.com. From this portal, you can access insights into your page, as well as manage your custom audiences, pixel tracking codes and more.

Because Facebook changes regularly, more detailed advice about using Facebook can become dated very quickly. Most of the advice available online for businesses in optimising pages is applicable for union campaigns.
Recent elections in the UK and US have unleashed a wave of social media campaigning tactics. It remains to be seen how effective those would necessarily be for union campaigns (compared to party-political campaigns), and of course, changes to social media platforms and algorithms means best practice becomes bad practice quickly. But here’s a few trends as of the time of writing:

- **Video.** Video consumption is still increasing rapidly, especially on smart phones. Videos don’t necessarily need to be slick or professionally produced to be effective; in fact, the latest campaign trend is to make videos deliberately look like they were made by amateurs.

- **Advertising.** The days of free exposure on Facebook is gone. In both the US and UK, conservative political organisations (parties and campaign groups) are spending an increasing proportion of their advertising budgets on Facebook rather than TV/radio.

- **Attack.** Social media is not a good medium for detailed or nuanced debate. The most effective messaging on social media from the big campaigns (in terms of shares and engagement) are ones that are both simple and negative.

- **Share. A lot.** The advice from Facebook a few years ago was that over-sharing was bad. The most successful social media campaigns now share new posts and content multiple times a day. The most successful campaigns in the UK posted more than twice as much as the next most successful campaigns.

- **Promote events.** Events (both native Facebook events, and events promoted on external sites) are used by campaigns to get supporters to take real-world action. Promotion of events,
especially with advertising, using the advanced targeting features, is increasingly used to turn the online into off-line.

**How are the big campaigns using Facebook ads?** If you use Firefox or Chrome, there’s a free browser plugin that you can use to see what the political parties are doing in terms of data and targeting. Check out [whotargets.me/en](whotargets.me/en)

### WHAT’S FACEBOOK CAMPAIGNING FOR?

The main thing to consider at this point is the purpose of your Facebook page and Facebook engagement.

In my view, social media campaigning needs to support real-world activities. In most instances, the usefulness for Facebook is the following:

- **Raising awareness of your campaign.** In most circumstances, even very engaged unionists and pro-union workers will have a limited awareness of your campaign (especially at the start), and will have limited awareness of various events along the way. Facebook (in particular Facebook advertising) can help address the awareness-gap.

- **Lead generation.** There’s no shame in list building. The most effective way to get someone to take an offline action is to ask them. Without their contact details (an email address or phone number), it’s impossible to ask them.

- **Real world action.** All online campaigning (in my view) needs to ultimately cause a real person to do a real thing in the real world. As noted earlier, events are increasingly used by campaigns to turn online support into off-line action.
There is increasing research that shows Facebook is not useful for persuading people to change their attitudes or views. (In fact, any advertising is very ineffective at changing attitudes.)

However, there’s more and more research that shows that Facebook helps build awareness and (for people already supportive) brand loyalty. The more a person becomes voluntarily involved with a brand, through whatever channel (website, face-to-face, newsletter or journal, social media, etc), the more they will be interested in recommending and revisiting the brand. This behaviour becomes self-reinforcing and leads to attitude change, and ultimately “purchase intent”. For a union, read “campaign” instead of “brand”.

Remember too: Raising awareness is also for people who are already connected to your union and your campaign. Just because someone is a union member or are on your database as a supporter, doesn’t mean they will retain a high awareness of your campaign after the first interaction.

Facebook tip: In the realm of conversion centered design it’s not rude to point. So be blunt in your intent and show and tell people what you want them to do on every page that matters.

Lead generation

Reduce the barrier to entry

The nub of online campaigning is getting those all-important contact details. Without those contact details, it is impossible to ask them to become involved in or support your campaign.
Any request for data — any form to fill out — is a barrier to engagement. Similarly, slow landing pages is a barrier to engagement, as someone is more likely to exit the page than wait for it to load.

Examine your landing pages and the forms on them. For any targeted traffic, you should be using a specific landing page, rather than your home page.

FRICTION POINTS

**Number of fields.** Typically, the fewer fields you ask for, the higher the conversion rate. The trade-off is that less data equates to a lower quality of lead (e.g. only having an email address means you can’t mail or call them).

Depending on what CMS you’re using, you may be able to capture more information in the “Thank You” page. Sites like Avaaz, GetUp and Greenpeace use this tactic very effectively. For example, you could set up a petition that only asks for an email, then the Thank You/confirmation page can ask for a phone number; even if the person doesn’t provide their phone number, you can still contact them via email.

**Page speed.** The issue of page speed is discussed earlier in this guide. With the advent of fast mobile internet, most people in Australia expect very fast page speeds. A page that takes 7 seconds to load has a “bounce rate” that is 200 percent worse than a page that takes 2 seconds to load. (Bounce rate is the metric that measures when someone visits a single page on your site and leaves without viewing another page.) In campaign terms, when someone “bounces”, it means they didn’t engage with the page, or complete the action, i.e. they didn’t sign the petition, join, volunteer or donate.
Conversion form tip: Try some testing with two versions of your form (called an A/B split test), with different numbers of fields. Which one converts more?

Conversion rate optimisation

How well are your landing pages doing?

Unless your campaign website is in the unlikely state of having 100 percent conversion rates, you’ll want to spend some time to improve your landing pages. This will take about ten minutes to evaluate your pages using a scorecard and then a bit longer to set up an A/B test.

The reason we do this is to try to increase the effectiveness of your website. Remember, the purpose of the website is to have a real-world effect. If the website is not prompting anyone to volunteer or donate or sign a petition or do something, then it’s a waste of time and resources. Optimisation is intended to maximise the number of people who actually complete the action.

Landing page tip: If your campaign is big enough or well-resourced enough, you should always continually improve your landing pages. This could be spending a few hours each week to run through one of your important landing pages to see what could be improved. This is best done with a small group of two or three people. Then run an A/B test to see which works best.

Run through the questions below for your existing pages to create baseline. This is what you can use to measure future “improved” landing pages
against. The scorecard also gives you a list of to-do items to improve (all the questions to answered “no” to).

**Landing page tip:** Getting a fresh perspective from someone else in the campaign team can help bring new insights to your landing pages.

### LANDING PAGE SCORECARD

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Are you sending your inbound traffic to a standalone landing page?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
<tr>
<td>2. Does each inbound traffic source (email, pay per click, social) have its own landing page or UTM code?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
<tr>
<td>3. Do you test multiple versions of your web pages (e.g. A/B testing or multivariate)?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
<tr>
<td>4. Does the main headline on your landing pages match the message of the referring link (e.g. ad copy)?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
<tr>
<td>5. Do you use multimedia (e.g. a photo or video) on your landing pages?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
<tr>
<td>6. Have your images been optimised to load quickly?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
<tr>
<td>7. Are you using directional cues (like arrows) to direct attention to the call to action (e.g. an arrow pointing at the sign up form)?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
<tr>
<td>8. Is your call to action “above the fold”?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
<tr>
<td>9. Does your call to action explicitly describe what will happen when someone clicks on that button (e.g. “join”, “donate”, not “submit” or “click here”)?</td>
<td>Y ☐</td>
<td>N ☐</td>
</tr>
</tbody>
</table>
10. Has your landing page been designed to make your call to action stand out?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

11. Are you only asking for essential information on the lead capture form?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

12. Have you removed unnecessary content (e.g. excess words/images)?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

13. Are you using bullet lists to simplify your content?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

14. Are you showing “trust factors” such as testimonials or logos of supporting organisations?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

15. Are there mechanisms to allow visitors to share the page with others (e.g. tweet this or like buttons)?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

16. Is the landing page only about one issue or topic?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

17. Is the call to action the most obvious thing on the page?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

18. Does your landing page pass the “5 second test”, could someone tell what it was about in that time?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

19. Have you got rid of all navigation and menus?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

20. Have you set up a confirmation page, and does it have extra calls to action?

<table>
<thead>
<tr>
<th>Y</th>
<th>N</th>
</tr>
</thead>
</table>

**TOTAL SCORE?** (Add up the yeses)

### Analytics

**Look for under-performing areas of your site**

By this stage, your campaign website should have been operating for a few months. It’s time to look at which parts are working and which aren’t.
The most important areas were defined at the start when you set up your conversion goals and funnels. Examine those reports and look for:

- High bounce rates on key landing pages (bounce rates are the percentage of people who arrive on that page then leave the site altogether without looking at another page on your site);
- Poor conversion rates for any of your goals;
- Look at the exit points for your engagement funnel — where are people disengaging?

Your goal here is simply to use your analytics to uncover the weakest links and establish some priorities for improvement. The best way to improve things is to run a test — your CMS should be able to do this (or use a tool like Google Optimise (optimize.google.com) or Optimizely (optimizely.com)). Specialist landing page platforms like Unbounce or Convertflow will let you create AB tests within the platform.

**A/B testing and false positives:** While most email and websites include an A/B testing feature, few of them tell you that the majority of tests are not statistically valid. Statistically valid A/B tests are only possible with many thousands of data-points (i.e. page viewers). To run effective and valid tests, you should make sure the test goes for a significant period of time (e.g. at least 7 days) or has a few thousand visitors/ recipients, or both. For pages or email broadcasts with a small audience, it probably isn’t worth doing an A/B test.

More here: abtestguide.com/calc/
Advertising

Compared to a few years ago, there’s a lot more options, including retargeting, and lots of new ad types. Check the many good advice website and Youtube videos about effective digital advertising and using the latest features on Facebook or Google.

Message testing

A simple way to get started is to use ad variants to compare the effectiveness of your different ad messages. Ad groups (or ad sets on Facebook) are a way to organise groups of ads based on themes, keywords, targeted audiences or another criteria.

This is one way you can use online tools to help solve intractable campaign issues, such as key messages.

For example, if you are going to print thousands of flyers or letters about a particular issue, before you press print, run a Google or Facebook test to see which variant of the message works best (or do the five second test mentioned later in this guide). Similarly, a lot of campaigns now use quickly produced videos to test the messaging of ads before they’re produced for TV (which obviously costs a lot more than a Facebook or Youtube ad).

This can also be trialled to see which key lines for your general communications messaging will work effectively. For example, the Trump campaign and Republicans used extensive Facebook advertising to test what rebuttal lines worked best during the 2019 impeachment proceedings.
Advertising tip: Google and Facebook ads are built to allow you to run literally hundreds of tests to find the best combination for your ads. Using a tool like Adespresso, create variations of your ad copy, images and calls to action. Let the ads run for a week (depending on your budget) and then check which are the high performing ones. Delete the underperformers (and make sure you let the rest of the campaign team know your findings of what messages work best).

Retargeting

Retargeting is a type of advertising that uses cookies (or “pixels”) to target ads to people who have already visited your website (but are anonymous) or who are already in your database. Platforms like Google, Twitter and Facebook all have tracking codes that allow you to conduct retargeting ads.

If you’ve ever visited an ecommerce store and looked at a pair of shoes, then had ads featuring those shoes appear on other sites you visited, then you’ve been retargeted.

Your campaign can use retargeting too. There’s a few reasons why you’d want to:

- **It raises awareness.** Just because the target of the ad visited your campaign site, doesn’t mean they have a high level of awareness of your campaign. Retargeting means you can boost awareness of your campaign, ideally as a precursor to a more effective campaign goal (conversion).
- **It converts.** Retargeting allows you to try to convert people at specific stages of the engagement funnel. For example, you could run ads targeting people who’ve visited your union’s join page but didn’t complete. Or you could run ads targeting people who visited multiple petition pages, asking them to volunteer. Retargeting ads can be designed to move people through the engagement funnel from one stage to another.

To actually set up a retargeting campaign, you should refer to the many free guides online.

**Ad optimisation**

By now you’re sending each ad group to their own landing pages. Your next step is to make sure the message between the ad groups and the landing pages are matching up. The quality score is a term that is a variable score that influences where your ad appears (its rank) and its cost (the cost per click). The higher the quality, the higher the rank and the lower the cost. By matching the ad copy to the landing page copy, you increase the quality score. Simple.

A lot of landing page platforms, like Unbounce, have features that let you dynamically replace content on the page (e.g. headlines or button text) based on the UTM codes attached to specific ads. This ensures that your ad quality score isn’t reduced.
Part 5

Network, testing, improving

Here we’re introducing split testing (also called A/B testing). This will make your emails more effective and improve your landing pages. Once you start testing, you should be able to incrementally improve the effectiveness of every element of your digital campaigning.

Email

A/B testing

Your email service provider or marketing automation tool should allow you to run A/B split tests on your emails. This is a basic feature, so if your tool doesn’t do this, consider using a different one.

A/B testing is a great way to find out what interests your supporters and what message or call to action they respond to. This also lets you test what kinds of subject lines work best — exciting hyperbole or boring functional subjects.

There are lots of things you can test in your emails, such as:

- **Subject line text**: Can you personalise the subject line (add their name or other personalization)? Short subject lines or long ones? Questions or statements?

- **Day of week**: Which day do people open and read their email? Are weekdays best or weekends?
• **Time of day**: Is the morning or after lunch best?

• **The “From” name**: Should emails come from the union as an institution, or an individual?

Whatever email service you’re using should have resources on how to use A/B testing effectively. Running these tests can be a real art.

Make sure you read the box about A/B testing and false positives earlier in this guide. This kind of testing is only statistically valid when the sample size is sufficiently large. If you’re only sending an email to 1000 or so people, your A/B test won’t be statistically valid.

**TRENDS IN EMAIL CAMPAIGNING**

Like so much online campaigning advice, the best practice today may be bad practice tomorrow. Rather than rely on the trends here, it is best to conduct your own trials.

One of the main areas of debate and testing amongst email campaign professionals is the email subject line. This is because the subject is the first impression or barrier for a recipient.

Here’s some recent trends:

• **Short subjects**. You have the attention of your recipient for just a few seconds, so short subject lines help get your point across immediately.

• **Long subjects**. A few campaigns, especially those on the left such as the Bernie Sanders presidential campaign, have found that long email subject lines perform better. These can be entire sentences, up to 40 or 50 words in length. Some
research finds that emails with longer subject lines have a 25 percent higher average response rate than those with short subjects.

- **One word.** The ultra short subject line trend was made famous by Obama. One of his campaign’s best performing emails was a single word: “Hey”.

- **Name.** Personalised emails have been around since before email existed (in hard-copy letters for example), and adding the recipient’s first name to the subject can be a way to increase your open rate. Just make sure your email program has a “fallback” option if you don’t have the first name of all your contacts.

- **State, suburb or location.** Another form of personalisation is to include the state, suburb or personal location of the recipient in the subject line.

- **ALL CAPS.** While some regard this as the online equivalent to shouting, or complain that it is bad practice, a lot of major campaign organisations find that you can get a “sugar-hit” with subject lines in all capitals.

- **Send in the morning.** An increasing number of people check their emails in the morning, often a short time after they’ve woken up and before they’ve arrived at work. What’s more, emails sent and read in the morning on average are read for a longer time than emails sent and read in the afternoon or evening.

- **Ugly emails.** Earlier in this guide, I noted that well-designed emails have less engagement than text-based emails. Some campaigns are taking this to an extreme, by trying to
deliberately make their emails look “ugly”. This is to make their emails look “authentic”. There’s a lot of evidence that ugly emails perform much better than nice looking ones.

The ultimate goal for all of these trends is to get the recipient to open the email. Experiments with subject lines are often targeted not only at the recipient, but also about trying to avoid email inbox spam or “promotion” filters (more than 20% of US presidential emails go to spam for example).

For example, Gmail is the most used email system, with around 30 percent of market share. The objective for email campaigners is to avoid the campaign’s email from being tagged by Gmail as a marketing or e-commerce email and therefore gets shifted out of the main inbox.
Organic search

More optimising and inbound links

Like so much of the online campaigning world, the best practice for search engine optimisation changes regularly. A major focus about five years ago was on inbound links, then this was deprioritised after it was gamed by spammers. Now it’s returning as a way for search engines to determine the level of “trust” your site has.

The bottom line for a beginning campaign is this: Incoming links to your campaign website are important because they’re one way that Google (and other search engines) rank websites in search results, and they demonstrate “trust”. The more links, the more bonafides your site has. Ideally, your inbound links should use your core keywords.

For advanced SEO, there’s a lot more than this. And unfortunately, SEO is a fairly dull part of the online campaign arsenal. Getting to the top rank in Google for your campaign’s name or slogan is just one reason you should care.

There are a few ways you can build inbound links. The obvious ones are to share links with other unions or your own union’s branches and national office website. If you operate separate campaign and union websites, then make sure your better ranking site (typically your main union site) links to the campaign site.

If you have organisations supporting your campaign, ask them to write a blog post in support of the campaign (you could provide this) with a link to the campaign website. Ask your state TLC to do likewise.
Inbound link tip: Use Google Alerts to find when your union or campaign keywords are mentioned. Then contact the site owners (especially supporter organisations or bloggers) and ask if they can change the link text to the most beneficial for your campaign. Obviously be polite and be aware that not all bloggers will look favourably at this request.

Conversion rate optimisation

A/B test your landing pages

Simply put, A/B testing lets you resolve those arguments that happen from time to time in campaign planning meetings where there are quibbles over the colour of a button, the layout of a page or the wording of a headline.

Running a test lets you compare two or more versions by running concurrently a control version and a variant version over a period of time. At the end of the test, you can see which one is more effective.

Split testing tip: If you’re using an advanced content management system, you may be able to run multivariate tests. Multivariate tests are where you run comparisons on multiple elements at once, such as comparing colour, layout and copy changes all in one test. This is quite advanced and should be done by a professional — and really should be done as a matter of course for webpages getting 1000s of views.
There are many tools available that aim to make this process simple, and I’ve mentioned them earlier. If you’ve got a professional web developer, ask them to set it up for you.

You know you want to run a test, but what exactly should you test? A little bit earlier I suggested using the landing page scorecard to help you figure out what you should be changing on your page, such as button colours, call to action text, photos or videos, and so on. Refer back to this when you plan your test.

**The five second test**

Everyone is more time poor than ever before, so your landing pages need to get to the point quickly. Most people who visit your campaign website will stay on it for less than 25 seconds and read less than 20 percent of the content. Is your landing page designed with that in mind?

This is the nub of the five second test. If a page doesn’t load within 3 seconds, most people will leave the page — but they will also leave if they can’t see the value in it. This means you need to hone your landing page messages to be easily and quickly understood within the remain 2 seconds you have after it loads.

The five second test is easy to conduct. Get a few volunteers or campaign staff and sit them in front of a computer or to get out their smart phones and visit the website. Flash your landing page up for five seconds then hide it and ask them what the page was about. If they can’t tell you what the purpose of the page was or what the main take-away message was, then you need to simplify it.
There’s also specific tools that help run this kind of test, for example UsabilityHub (fivesecondtest.com).

**Simplification tip:** Remove as much text as you can and turn prose into bullet points or headlines. Can you replace text with a picture and a caption? Try this and run the test again.

The five second test is not only useful for campaign websites, it is a familiar qualitative test tool in market testing. You can use the five second test for campaign posters, flyers or any kind of media.

Why five seconds? Because increasingly, people are impresionistic; they make judgements about a thing (product, service, policy, etc) based on their first impression.

**Content**

**Write about others**

People love to talk about themselves, but they also love to hear others talking (positively) about them. Your campaign can benefit from this by writing about others.

Which others? Organisations that are allies or who endorse your campaign. Your members, delegates and activists. Other unions. Politicians who support your campaign are especially likely to share your content if you mention them. Make sure to add a link to those organisations’ or politicians’ websites in a blog post (and add any photos of the visit if you have them). Many of these organisations will be notified by their own Google Alerts. You can also alert them to your link through including their...
name in a tweet or Facebook post. Finally, you could email them to notify them of your blog post and link.

If you’re lucky, and are creating positive and interesting content about another group or organisation, they will join by sharing your blog post or tweet to their network, thereby extending your reach and bringing in potential new leads. Remember to **have a call to action at the end of your blog post** to help capture those leads.

**Share your database**: Some of the more successful campaign organisations are ones that are generous with support for other campaign groups. For unions, this means sending emails to your members and supporters about the campaigns, fights and appeals from other unions and even other non-government groups. This not only has the benefit of improving your relationship with those other unions, but it can also improve the health of your email list. What’s more, the entire union movement is strengthened when we share our resources; a campaign supporter on your database may never volunteer with your campaign or join your union, but could volunteer for another union’s campaign.

**Videos**

Videos remain a key content form for online campaigns. Here’s some advice for producing videos for your campaign.

**CREATE VIDEO YOU’D WANT TO SEE YOURSELF**

While you should aim to produce content that engages and interests your target audience, the first step to brainstorming an effective campaign...
video is thinking whether it’s the kind of video that you’d actually want to watch yourself if it came from somewhere else.

CUT DIFFERENT VERSION OF THE VIDEO FOR DIFFERENT PLATFORMS

Although I noted that videos can be reused across platforms, it’s also worth re-using those videos but performing different edits on them. For example, Youtube is more suited to long videos, whereas Twitter or Facebook is more suited to very short videos. Chopping up an existing video into new shorter videos is something that movie studios and popstars do, and it means that you can reuse your flagship video (e.g. a TV ad) multiple times as new content.

OPTIMISE FOR MOBILE AND USE CLOSED CAPTIONS

One of the most successful digital video production companies, NowThis (nowthisnews.com) puts mobile users first. Because of this, their videos are designed to be viewed and accessible on smart phones with no sound. Using closed captions or text that writes out what people in the video are saying means that the content can be viewed even if the sound is off.

INSPIRE STRONG EMOTIONS

The most impactful ads in the 2019 US and UK election campaigns were ones that resonated emotionally (typically negative emotions). Videos that don’t make you feel something won’t be very effective in an environment of media saturation.
Media kits

This is a tip that many campaigners forget: include a media kit on your campaign site. Media kits should be aimed not only at journalists working for major papers, but also for bloggers, independent journalists, reporters from trade magazines, journals, and local papers.

Even if you are only running a small campaign, it can be worth putting together a media kit.

WHY DO YOU NEED A CAMPAIGN MEDIA KIT?

Chances are, whatever campaign your union is running, you will want to get a story in the paper, on the radio or the TV. Journalists are busy people. If you haven’t initiated contact, they will want to easily find out who to call to get briefed on the campaign, as well as some basic information answering the Who, What, Why, Where questions.

You will want to have your media kit available for download on your campaign site, and you should probably link to it on your main union site as well. A media kit can also be distributed at the campaign launch if you have one.

What goes into a good campaign media kit?

- **The whys of the campaign**: You should have a good backgrounder; two versions, a short and long version. The short version should explain the campaign in just a single sentence. The longer version can go for several paragraphs. If your campaign website has an “About” page, this information should be basically the same.
MINISTRY OF INFORMATION AND COMMUNICATIONS

INTRODUCTION TO ONLINE CAMPAIGNING

- **Supporting info**: This is all of your campaign fact sheets, biographies of important figures of the campaign, your statistics, tables, charts and so on. Basically all the stuff you’re relying on to justify and explain your campaign.

- **Your campaign and union logos**: Include logos for your campaign, and your union. This is especially useful for online coverage. Rather than have grainy, pixelated logos, why not include good quality logos for media outlets to use? When journalists and other people check your web page and report on it (whether in the paper or online), they may want to get a copy of your logo. Similarly, if you’re able to get your campaign on TV, they are likely to use your logo in the background – make it easy for them.

- **High definition videos**: Media outlets are increasingly relying on video media releases from PR firms. Getting good quality video for TV is essential for reporting on the nightly news. All campaign videos should be shot using high definition video, and if your campaign does use video a lot, make sure that you have good lighting and sound. Videos can also include vision from the campaign launch, and sound-bites from key campaign figures, such as elected officials and members. Consider providing some generic campaign shots (called “cutaways”) as well (e.g. footage of a nurse in a hospital for an nursing union campaign, or teachers in a classroom for an education union campaign).

- **Photos and campaign images**: Like videos, having good quality photos of your campaign are important for a media kit. Newspapers typically like their own photographers to take shots for the paper, but smaller outlets such as local
newspapers are sometimes willing to use provided images if they are of good quality. Photos should cover the major Who, What, Why and Where questions, and be diverse. Make sure you use a good quality camera. These photos can also be re-used for other campaign material like leaflets and posters. Minimum quality for photos should be a minimum of 300 dpi (dots per inch) in jpg format.

- **Easy to find contact information**: Make it easy for the media to find out who is the campaign spokesperson, and how to contact them.

- **List all of your social networks**: Don’t make journalists have to use a Google search to find your Facebook page or Twitter account.

- **Links to all your media releases**: As your campaign goes on, you should update the campaign site to include press releases. This is useful for journalist, as it saves them time when finding quotes or information, and lets them simply cut and paste, rather than rewriting bits from a media release. Including your media releases (such as in a blog) is also good for Search Engine Optimisation (SEO). If you don’t have all of your media releases on your campaign site, you should at least put them on your main union website and have a link from the campaign site to them.
Part 6

Feedback, segmentation, surveys

This final part focuses on the intermediate to advanced online campaigning techniques, including how to get feedback from supporters, more on segmentation and rapid response advertising.

However, I am assuming your budget is still limited to that of a small state or federal campaign. Because of your limited budget, your access to some of the more advanced online tools will be unfortunately out of reach, and would probably be unnecessary because you’re unlikely to be dealing with tens of thousands of leads or volunteers.

If you’re working in a national union office or are running a well-funded campaign with tens of thousands dollars to spend (or thousands of volunteers and leads), I recommend that you consider hiring specialists or engaging professional consultants with a track record in online marketing.

Which professionals? There are a lot of campaign contractors that float around the union and progressive movements, but for digital campaigning, especially technical areas like SEO, optimisation and advertising, it may be worth engaging a commercial firm without direct union experience.

The ACTU is developing capabilities in this area, so even if you’re at a state or local union branch, it’s worth contacting them for assistance.
Email

Your email list is not a single, homogenous group. To get the most out of your email campaign efforts, you need to start thinking about the different groups or segments that make up your list.

Almost every email system or marketing automation platform will allow you to send personalised emails, but personalisation is not just “first name”, it is also sending relevant, segmented messages.

What are some of the segments that you can consider?

Active subscribers

Active subscribers are people who regularly open and click the links in your emails. Typically, you’d consider someone active if they’ve opened or clicked an email in the last 3 months; after that, they should be considered inactive. Most email tools will let you easily create a segment based on email activity; if your tool doesn’t, then you should seriously consider switching to one that does.

Your active subscribers are some of your most engaged supporters, and they’re often the most fertile ground to try to recruit new volunteers.

Inactive subscribers

Someone who hasn’t opened an email from you in the past 3 months or more should be considered inactive. After this length of time, you should start removing inactive subscribers from your main email blasts. Email providers (like Gmail and Outlook) use engagement (open and click) rates increasingly to determine which emails get sent to spam or the
promomotion tab. If you’re sending large numbers of emails to people who don’t open them, you’ll start negatively impacting your deliverability.

However, don’t necessarily give up immediately on this segment. Instead of sending them emails to volunteer or get active, you should develop a re-engagement email series; for example, send them surveys or polls, or ask them to re-subscribe.

**Volunteers / delegates**

Try not to lump your existing delegates or volunteers with your main email list. By the time your supporter is volunteering with your campaign (remember the engagement funnel? they’re contributing), you should be using more personalised contact rather than mass email blasts.

Your volunteers or delegates should get different messages to your general supporters; but don’t forget about them and stop emailing them. Continue to engage them with updates and information, just remember to recognise that they should be communicated with differently.

**Geography**

Being able to segment by geography is one of the benefits of email and digital communications. Your email tool should allow you to segment by state, postcode or city/suburb. Many landing page tools (e.g. Convertflow) can capture this information automatically via the supporter’s IP address. If you can’t get this information automatically, you’ll have to ask for it.

With this information, you’ll be able to send more relevant emails. One of the big advances of the 2012 Obama campaign for example was their
ability to send email invitations to events based on geography. This meant that supporters were sent the details of events close to them, rather than irrelevant events that were a long way away.

**Small segments**

The more you segment, the smaller they will become. While the media is obsessed with microtargeting, the truth is that very small segments (whether on email or social media) are not that useful. Online campaigning, including email, is a numbers game, and sending segmented and personalised emails to a hundred people is unlikely to net you a result that is better than sending to 1000 people.

**What to ask your email list?**

There’s a strong temptation to always send petitions to your email list. No matter what is going on, a good online petition is the mainstay of digital campaigning.

But there’s a lot more that you can ask your supporters to do, and an endless request to sign petitions can drain the enthusiasm of a supporter who is looking to become more active in the real world.

You can’t skip a user to the bottom of the funnel before they’re ready to be there. But that doesn’t mean you shouldn’t be focused on driving these newly energized supporters down your conversion funnel.

Remember as well that the engagement funnel suggests what kinds of asks you should suggest to your supporters. You should be moving people down the engagement funnel, so people ready to get active could be asked to attend an event rather than sign a petition.
Here are some suggestions of asks for your supporters:

- **Surveys.** Surveys are a good tool for supporters at the top of the engagement funnel. Not only do you hear their views and attitudes, but surveys are a good opportunity to ask them for more information about themselves, including state, postcode, gender, mobile number, and any issue interests.

- **Polls.** Similar to surveys, you can help prime supporters for further action. A poll is typically a single question.

- **Petitions.** Online petitions are one of the lowest-barrier online actions to encourage supporters to take, and they’re also useful for gaining new leads. Petitions are the one of the best ways to take advantage of something happening in the news, e.g. major stories or events.

- **Letters.** Write a letter about an issue and invite your supporters to co-sign it. (In practice, this is similar to an online petition.)

- **Mobile Opt-Ins.** A tactic that is effectively used in the US is to ask your existing email supporters to opt-in to receiving SMS updates. This helps grow your opted-in mobile list, and down the line can help you with turn-out for events and rallies.

- **Share Content.** With organic reach on Facebook reaching all-time lows, asking your supporters to watch and share content on social media not only helps raise awareness of your issue but can also assist with expanding its reach (for free).

- **Volunteer.** Ask supporters to volunteer. If an event triggers them to engage, use the opportunity to get them to commit to helping out.
• **Donate.** If your campaign accepts donations, ask your supporters to chip in. This can often be a supplementary action to suggest if someone can’t volunteer.

• Attend an event. Ask your supporters to attend an event or action, for example a forum or a rally.

**Social media**

**Stay in the conversation**

Depending on how much resources you have to devote to social media will determine how personalised your responses are and how much you spend responding. Consider using tools like Tweetdeck ([tweetdeck.twitter.com](http://tweetdeck.twitter.com)) or Hootsuite to keep up to date with your core hashtags and account on Twitter. Because it’s real time, it means you can jump in and actively engage.

If you can convince your union’s secretary or other leaders to do the same (good luck) then encourage them to engage as well. Look at what some union leaders are doing on Twitter, especially during peak political discussion times such as when the Insiders or Q&A TV shows are on.

Facebook can take up a fair amount of time, especially responding to individual comments. But it can be worth it.

**Breaking news:** Increasingly, social media algorithms prioritise breaking news and “hot topics”. This means you should keep up with the latest news and be prepared to respond to it, even if this means sharing the post of another organisation (e.g. the ACTU or another union).
Digital-first campaign organisations like 350.org use volunteers to respond to people who comment on their Facebook posts with friendly prompts to volunteer and a link to the volunteer page, or inviting them to join a specific Facebook Groups. By inviting them to a group, 350 takes the new supporter down the engagement funnel from being an observer to a follower.

By deputising and empowering volunteers (or other union staff) to be active on your campaign’s Facebook, you’re also helping develop them down the engagement funnel.

**Review what others are doing**

Largely in response to the Cambridge Analytica scandal, Facebook has created an Ad Library ([facebook.com/ads/library](http://facebook.com/ads/library)). This library lets you see all the ads being run by a particular page.

Why would you want to see what other pages are doing?

- **To borrow the best ideas**: Good artists copy, great artists steal. Large campaign organisations, especially the US presidential campaigns, but also the large NGOs like Greenpeace, are always trialling new methods to engage supporters, encourage new volunteers and get more donors. Reviewing their pages and their ads is a good way of seeing what “cutting edge” campaigns are doing and trialling whether it works for you.

- **For opposition research**: Especially if you’re running an electoral campaign, it can be important to know what your opposition are putting out there. This lets you respond (if
necessary) and also get an insight into what their online strategy is.

**MobLab**: Looking for cutting edge research and advice about digital campaigning? One of the best online resources was created by Greenpeace, the Mobilisation Lab.

mobilisationlab.org

**Share content creation responsibilities**

If you’re reading this, you’re probably the person responsible for creating and posting things to Facebook or Twitter. But that will naturally limit how effective and engaging you can be.

Increasingly, cutting edge campaign organisations are devolving responsibility on who can post to their pages, and reducing the levels of sign-off needed. For example, online-native climate groups give field organisers and even trusted volunteers the digital keys to their Facebook page, who then use their smart phones to upload videos and photo albums of actions, marches and events. One group who did this in 2018 reported seeing a more than 360 percent increase in reach on Facebook posts, a 316 percent increase in engagement and a 194 percent increase in page likes.

The key to this is setting clear expectations about the boundaries and limits of what can and should be posted on your union’s social media pages.
Make me go viral: You can never guarantee that something will “go viral” and consultants who promise they can are lying to you. All you can do is nudge things in that direction and make it compelling and easy to share your (interesting) content. It’s worth managing expectations. Getting Kim Kardashian levels of shares for your campaign video is unlikely, but a thousand or several thousand views or a hundred shares would be a massive success for a small campaign.

Mix up your content types

Most of the advice in this guide up until now for social media has focused on just the basic content types: text, photo and video post updates. But Facebook and other social media platforms like Instagram have all kinds of content types.

Share livestreams, produced videos, articles, photo albums and more. Host a webinar or live Q&A that provides a space for people to have an in depth conversation. Do quick updates and analysis. Whatever you do, just mix it up. Give your audience different elements of the stories in a variety of ways, and remember: your content doesn’t need to be professionally produced to be effective.

There’s a range of tools that let you easily and inexpensively create video content, e.g. Adobe Spark (spark.adobe.com), Canva (canva.com) or Animoto (animoto.com).
Cross-post

Cross posting is a term for recycling content (generally text) from one platform to another. It initially took off on Instagram, where users would screenshots of tweets. It is now a useful way to share a well-performing post from one social media platform to another.

We defeated the Ensuring Integrity Bill. Thank you to every person who stood up and said no to union bashing #auspol
The example here shows how the ACTU has taken a well-performing tweet by Sally McManus (ACTU secretary) and posted it to Facebook, where it has also performed well with over 1,700 shares.

Conversion rate optimisation

Learn from your supporters

There are a lot of tools you can use with your optimisation efforts, but one of the best is getting feedback from your supporters and the visitors to your campaign website.

If people aren’t filling out your forms, why not just ask them why? There are a few simple feedback widgets that you can use, such as small popup surveys. There are also live-chat tools, which you could use by your campaign’s manager, lead organiser or union leader to answer questions about the campaign (this could be cross-promoted in traditional media to build awareness and interest). Both of these tools could also be used to gauge feedback on policy and campaign issues.

The results of these surveys should be fed back into your testing process. Are people complaining about readability, too much text or not enough? Is the website running slow or crashing? Run a test based on that feedback as an alternative A/B test.

WHICH SURVEY TOOL?

Survey Monkey is fairly ubiquitous as a free survey tool with reasonable features (don’t use it for formal polling though). However, there are others like Survey Gizmo (surveygizmo.com) or Survicate (survicate.com) that neatly integrate with some of the other tools you may be using. If you
are using Wordpress, there are free plugins that allow you to set up “in-house” surveys, which can also be linked to your CRM or email database.

THE NET PROMOTER SCORE

In the business world, a metric called the Net Promoter Score helps companies determine the correlation between customer satisfaction and growth/profits. High growth companies typically have high net promoter scores. As a loyalty-based metric, customers are asked “how likely are you to refer us to a friend or colleague?” Depending on their answer to that question on a 0-10 point scale, customers are grouped into three categories:

Promoters (9-10): Enthusiastic customers who fuel growth with repeat purchases and referrals.

Passives (7-8): Current customers susceptible to competitor offerings and thus have a neutral brand impact

Detractors (0-6): Customers who voice dissatisfaction and harm the brand.

For union campaigns, you can adapt this concept to measure the enthusiasm of your supporters. A short survey on your website could ask “how likely are you to recommend [campaign name] to your friends and colleagues?” Running this survey over a week will give you a quick snapshot of where your campaign is sitting.

To calculate the NPS, use the following equation: NPS = [% of Promoters] – [% of Detractors]. A positive score means high satisfaction and
enthuisiasm. A negative score equals a low enthusiasm, dissatisfied campaign.

The Net Promoter Score is a useful tool for unions not just because it helps you identify loyal, committed members, but it also helps foster a culture of feedback, recovery and action in your union. It ensures that members are central to decision-making. It can be used by organising teams and leads to help improve activities and organising plans.

Practically, what are the benefits of this score for your union?

**Firstly,** it systematically categorises your members into promoters, neutrals and detractors. This produces the “net score” across your union, but can also be produced for segments of your membership: states, industries, worksites, etc. The simplicity of the score means it can be communicated effectively through your union.

**Secondly,** it creates a “closed-loop” system for using feedback to make changes inside your union to increase the number of promoters and decreasing detractors. It means that you, as a union leader, can actually take action to investigate drops in net promote scores in sections of your membership — allowing you take preemptive action to stop membership loss. It can also allow you to identify “bright spots” in your union.

**Finally,** it can help you put members at the centre of union decision-making. It can allow you to put the creation of more net promoters (i.e. loyal, enthusiastic members) at the centre of your union’s strategies.
Advertising

Rapid response

After several months of using online advertising, you might have become a self-taught expert. You may be getting loads of traffic and great leads with lots of supporters signing your petition or lots of people volunteering.

To take your ad campaigns to the next level, you want to start to get into the rapid response territory. This means putting up ads as events arise. If a major employer is found to be committing wage-theft, you could buy up the keywords on Google for the company’s name with a link leading to a page about your campaign. Are the Liberals attacking your union? Buy the keywords attached to their talking points or the politician’s name link to a rebuttal landing page on your website. Is a Liberal politician visiting a local school? Run short-run paid ads highlighting the cuts that school faces (or has experienced) under a Liberal government — with a matched landing page, and targeting the demographics of parents in the geographic area of the school.

Go pro

Finally, the larger your campaign, the more you’re getting into the territory of professional help. Professionals can help you get more bang for your buck and increase your conversion and click-through rates, as well as help with the more technical ad types and reporting.
Online Fundraising

Should unions fundraise? This is a question that occasionally gets debated, and for most union leaders, the answer is “no”. The reasons vary, but mostly come back to the notion that it’s not right for unions to ask for money from members who already pay union dues.

But what about retired members? What about non-members who can’t join your union (for whatever reason), but want to contribute? What about members who want to give more?

Since 2014, I’ve embarked on a fundraising journey at UnionsACT. Over five years, I’ve built a small fundraising program that now raises $80,000+ per year in small donations, from members, retired members and non-members, with an average donation of $28. For a small territory-based trades and labour council, this is significant extra income.
One of the big promises of digital campaigning in other sectors (but not the union movement) has been fundraising: the Obama campaign, then the Bernie campaign has shown that digital-first fundraising with small donations from thousands or millions of supporters can raise a large amount.

Clearly I think that unions should consider fundraising for campaigns. What are some of the things unions could consider fundraising for?

- A public-facing mass-media component (i.e. TV/radio ads or billboards) — this can be especially effective when there’s a specific ad that you want to promote (“Help us get this ad on TV”);
- An industrial case, like a particularly high profile or important court battle where the opposition are a well-funded corporation;
- Contributions to a strike-fund for workers who are currently on strike and need funds for living expenses, food and the like;
- A specific pilot organising program or campaign initiative, for example a push to campaign against bullying of young workers.

What I’ve found over five years is that union members (retired or not) want to contribute more than their dues. Not all of them can volunteer, but often our volunteers are the biggest donors, and often the path to becoming an activist starts by making a donation.

Fundraising can be a struggle. I’ve had professional experience in fundraising and development in the non-profit sector and for several state and federal campaigns, so I know that it can be very difficult.
This section is a short summary on how to get the most out of your digital fundraising efforts. Like the rest of this introduction, it is pitched for beginners. If your campaign can access the experience of a professional, then you’re in luck! Professional fundraisers are worth their weight in gold, and can make a real difference.

Many of the skills you’ve developed for digital political campaigning will be useful for online fundraising, and the reverse also applies: the techniques for fundraising can be applied to campaigning. Similarly, organisers will be familiar with many of the techniques here because they’re also adaptable to signing up and joining new members to the union. And remember, there’s lots of free guides online for the charity sector, which will be relevant for a union fundraising campaign.

**Be personal**

Effective fundraising campaigns are personal. Your biggest assets will be the personal stories of your members or the people your campaign is trying to help.

Being personal means telling a personal story about who will benefit from the fundraising. This doesn’t need to be a long story — even a few sentences or a short paragraph that is punchy and impactful can be effective. By focusing on the story of the beneficiary and showing how they will benefit, you can make your fundraising ask more powerful.
The personal stories of your campaign’s donors is also a powerful asset for your campaign. Ask people who have donated to explain why they support your campaign. This also serves as social proof, which is an effective motivator (this also works for volunteer asks or join asks).

Being personal also means honouring people’s stories, and through the whole process, respecting people’s experiences, feedback and ownership about their story. It’s not about grabbing some talking points and racing out, but taking time to build relationships. Digital storytelling at its heart should be about more than just views, but creating real transformations in people — in both the storyteller and the audience.

**Use multiple channels**

Email is the most effective, efficient tool to raise money online, but it’s not the only way. Social media provides that valuable social proof. Consider that different supporters will be more comfortable donating in different ways. Older people may prefer to send in a cheque in response to a hard-copy mailed appeal, while a twenty-something may be comfortable logging on to your website and using Paypal or Apple Pay to send you a donation.

The channels that will be effective will vary depending on the size of your campaign and size of your supporter database. This is why lead generation is important. Supporters who have signed up to your email list can be nurtured to become donors, as can volunteers.
Have a human connection

People respond to other people more than they do abstract appeals. Research in the charity sector for example has shown repeatedly that an appeal for an individual child living in poverty will be more effective than one that talks about child poverty in general.

This human touch means you need to work on the story behind your campaign. Who are the individuals that will benefit and how? The stronger the connection, the more effective the appeal. This may seem to go against the collectivist-culture for the union movement, but time and time again, the research shows that appeals focusing on a single person work better than ones for groups.

A key to this human connection is to avoid abstractions. If you’re concerned about workers who are locked out by an employer, then talk about a particular person affected by the lock-out. If you’re raising money for a campaign about more school funding, then talk about a specific child who would benefit from the increased funding (or who is suffering from the Liberal’s fundign cuts).

Needless to say, face-to-face meetings are the most powerful appeals.
Emphasise the impact

Even small efforts can make a difference. Since the Obama campaign in 2008, and more recently with Bernie Sanders in the US and Momentum in the UK, the impact of small value donations has been embraced by professional fundraisers.

Successful online fundraising should emphasise that even small donations can contribute to a big, tangible outcome. Because you’re likely running a smaller campaign with a limited budget, this is even more true!

Small donations are also useful because once someone has donated once, they are more likely to donate a second time. For example, over a year of fundraising at UnionsACT, we had 1700+ donors make over 4,300 donations, which means each donor gave on average 2.5 times each.

And if you are asking donors to publicise their donation via social media, lots of small donations can add up to a lot of publicity on social networks.

Persevere

Fundraising is hard work, but the payoff is worth it if it helps you win. Perseverance is important because not every appeal will be successful or raise the required funds. There will be dry spells and smaller campaigns compete with larger ones when promoting fundraising appeals.
All the skills you’ve learned with testing and segmentation are important for online fundraising. If one appeal falls flat, try again with two different message tests and an A/B test. Just because a single email doesn’t work doesn’t mean the fundraising campaign should be dropped.

The key to fundraising is that people don’t give unless they’re asked. So don’t stop asking. By repeatedly asking, you are sending the message that this appeal is important.

**Say thank you**

Donors give for a range of reasons, but it is always nice to be thanked. A sincere thank you to your donors shows that you appreciate their contribution, and importantly a timely, heartfelt thanks can lead to bigger contributions down the line.

Thanks and recognition can come in a range of ways: a personal thanks from the campaign manager or an elected union leader in the form of a phone call (mainly reserved for large donations), a hand-written note or a shoutout in an email, on your website or at an event.
Final note

This is the end of my introduction to online campaigning for unions. Thanks for taking the time to read through it all. Hopefully there’s stuff in here that’s useful.

This introduction was aimed as a basic guide to take someone from novice to intermediate level. There is a whole galaxy of advanced online marketing tools out there that most union campaigns in Australia only dream of. Most of these tools involve turning highly effective commercial tools to a non-commercial purpose — members, volunteers, donors and supporters instead of customers.

A lot of the things we’ve covered in this guide deal mainly with the top of the engagement funnel. Turning observers into followers. There has been less focus on the deeper, more engaged levels of the funnel — this is mainly because the activities you’ll be asking from your highly engaged supporters will be off-line. The goal of online campaigning is to get those people online who are interested to take action in the real world.

I strongly believe in marrying off-line campaign activities with online ones. The strategic approach I most strongly recommend is a “guerrilla” or insurgent approach. I strongly suggest that you read (or re-read) either Mao or Che’s On Guerrilla Warfare. They’re very short, and while not everything is analogous to a campaign and union organising, a lot is.
Because the truth is, all the online campaign wizardry and tech tools in the world won’t make a difference for your campaign if you don’t have an off-line, real-world impact.

Your role as the online campaign organiser is to cultivate those people online until they’re ready to be handed over to the campaign’s organisers to take real-world action.

Throughout this guide I’ve also regularly suggested getting in professional (specialist) help. In all likelihood, if you’re reading this, you’re working on a state or federal office of a union. Your budget (if you have one) is probably very small. I’m aware that there is not a lot of money out there for online campaigning (this is one of the reasons I talk about analytics and conversions — they’re a way to demonstrate the value of digital campaigns) so most of what is here you should be able to do yourself. However, this is really just dipping your toe in the water. Each area I’ve covered, social, email, advertising, SEO and content marketing (and more) could potentially have their own large teams of dedicated digital organisers.


Hopefully, the union movement will be moving in this direction soon. The ACTU in 2019 signalled its desire to invest in data and digital capabilities, including building tools and resources for the entire movement.
This is urgently needed! New disruptive technologies, such as big data, artificial intelligence (AI), cloud computing (the cloud), and the Internet of Things (IoT) are already having big impacts on workers, work and society.

Most unions are cautious (understandably, given the complexity and cost) about undertaking any major digital transformation programs without the skills, financial support, investment model, staff, patience, and culture to succeed.

But despite these hurdles, I believe it is more important than ever for union leaders to be aware of, and more-or-less understand the risks and opportunities posed by new technology and digital transformation.

This is for two reasons:

**Firstly**, because of the potential disruption for members and their jobs. There’s no doubt that technology has massively changed a whole host of industries: it’s not just digital tech, but innovation generally tends towards “productivity” improvements – that is, labour-saving (or labour-storing).

This is most evident in the telecommunications space, where fewer and fewer technicians are now needed to install and maintain telephone/internet services. The finance sector is also seeing the impact of technology-driven disruption; bank tellers are more or less replaced with apps, ATMs and AI-powered chat bots.
Each industry has its own dynamic of course, but even service sectors aren’t immune. Witness the rise of app-based rostering for NDIS and aged care nurses. While the actual “work” remains, the social relationships between employer and employee are being transformed.

Needless to say, in my view, unions and union leaders must be needs to be aware and vested in the digital and technological innovations in their industries and sectors. A greater understanding allows the leadership to then distinguish the “noise” (of trends and buzzwords) from the signal.

**Secondly**, because of the risks and benefits for the union as an organisation/institution.

Unions cannot sit on the digital transformation sidelines. Most unions still use fairly out-dated, legacy systems for crucial things like membership databases, financial, HR and payroll systems. Increasingly, these are a millstone for unions, when it comes to costs and opportunity-costs. These legacy systems more often than not are an impediment to organising, growth and building power for working people.

Obviously, unions operate in a highly regulated environment, especially when it comes to finances and membership. Change is hard.

And there are a lot of shonks out there selling rubbish tech-products who see unions as an easy target. There’s no single technology that will deliver “innovation”, and the best tools will differ for a given union; without a better understanding of what’s
possible, it is easy for to be conned by a company or consultant with a product to sell.

Unions need to lead this change, rather than be led. Something fundamentally important is happening, and for unions, what is happening may well be existential. It will be difficult to develop a strategy for your union if your leadership team are only tangentially aware of what is possible or what the risks are.

Back in 2016, then ACTU Secretary Dave Oliver kick-started a conversation about innovation in the union movement. It was (and is) an important conversation: some unions took up the challenge (e.g. United Voice and NUW merging to create the UWU), but parliamentary elections and legislative threats, have more or less drained our enthusiasm to actually go through the hard slog of innovation.

Digital and technological transformation is about sweeping change. It changes everything about how industries operate, how services are delivered to members. It necessarily should force union leaders to rethink how our unions organise, how we communicate, how we manage our staff, our finances, how we store and access our information systems, as well as everything about the nature of our relationships with members.

Of course, there are unions who are experimenting with different tools or systems, trialling AI or cloud-based systems. And it’s good that this is happening (we really should share what is the results of using these tools better though.)

But that’s not enough.
It’s not about shiny new tech toys. Tinkering is insufficient.

We should be talking and thinking about this all the time, with our leadership teams, with our management committees, with our staff and organisers. We need to mobilise not just individual unions but the entire movement.

There are signs that the union movement is starting to again take online campaigning seriously, which can only be a good thing.
About Alex White

Alex White is a union leader, strategist and campaigner with a career history of working in the trade union movement, major environment groups and political organisations. Since 2014, he has been the secretary of UnionsACT, the peak trades and labour council for the Australian Capital Territory and Canberra region.