September 26, 2024

Understanding Constituent Relationship Management for Advocacy Mobilization

Purpose of This Training

What is a constituent relationship management (CRM) system and how is it used in advocacy mobilization?

How to develop a mobilization strategy using CRM tools

What type of CRM system works for me?

What is a CRM and What Can it Do?

CRM (constituent relationship management) is a technology for managing all your organization's relationships and interactions with supporters and potential supporters.
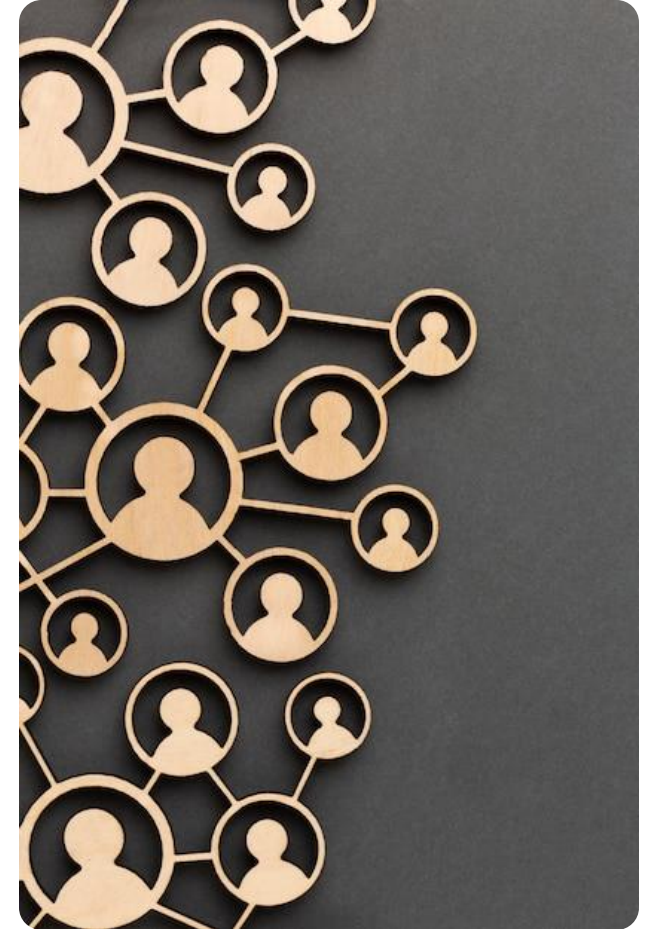
CRM tools help you to improve relationships to grow your organization by helping you stay connected to supporters, streamline processes and measure success.

➡️ Who is doing what?

➡️ How do I connect the dots between my list and action?

What is a CRM and What Can it Do?

Database

- Manage Email Subscribers
- Manage WhatsApp List/Group
- Track Actions/ Segmentation
- Measure Engagement

Communications

- Send Email Messages
- WhatsApp Messages

Action

- Manage email sign up flow to database
- Create Website Actions
- Drive to Social Actions
- Offline Event Management

CRM Systems Connect Supporter Databases to Communications Tools and Action Opportunities

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Why are CRMs Important

Managing Data

- Capturing and organizing supporter contact info
- Email list management
- Track advocate actions
- Flow of email sign up to actions

Mobilizing Action

- Action toolset for petitions, contacting decision-makers etc.
- Easy pathway from email to web-based action

Building Sustainable Supporters

- Target segments with appropriate asks
- Manage unsubscribers effectively
- Build a ladder of engagement

Which of these ring true to you for your CRM needs?

Managing Data

- How do you collect contact info of supporters?
- What is your means of contacting supporters regularly?
- How do you track what they're doing?

Mobilizing Action

- What kind of actions do you ask supporters to take online?

Building Sustainable Supporters

- How do you use data to understand what supporters want to do or don't want to do?
- How do you ID and build a group of deeply committed advocates?

Spotlight on CTFK

How does Campaign for Tobacco Free Kids Utilize CRM Systems?

- Bryan Buchanan, Director, Digital Engagement
  - How doe CTFK use CRM for advocacy in the U.S.?

What Do You Need to Be Successful Using a CRM?

Building the business case:

- Time and planning
- A campaign strategy that calls for mobilization of public audiences to action
- Buy in from leadership
- Website with sign up functionality to email or WhatsApp
- A list of people that you are already communicating with via either email or WhatsApp
- An environment where direct communication for advocacy is common practice
- A clear understanding of the privacy policies in your country and the ability to be compliant with them as they change

How Can Directly Communicating with Advocates Help Your Mobilization Efforts?
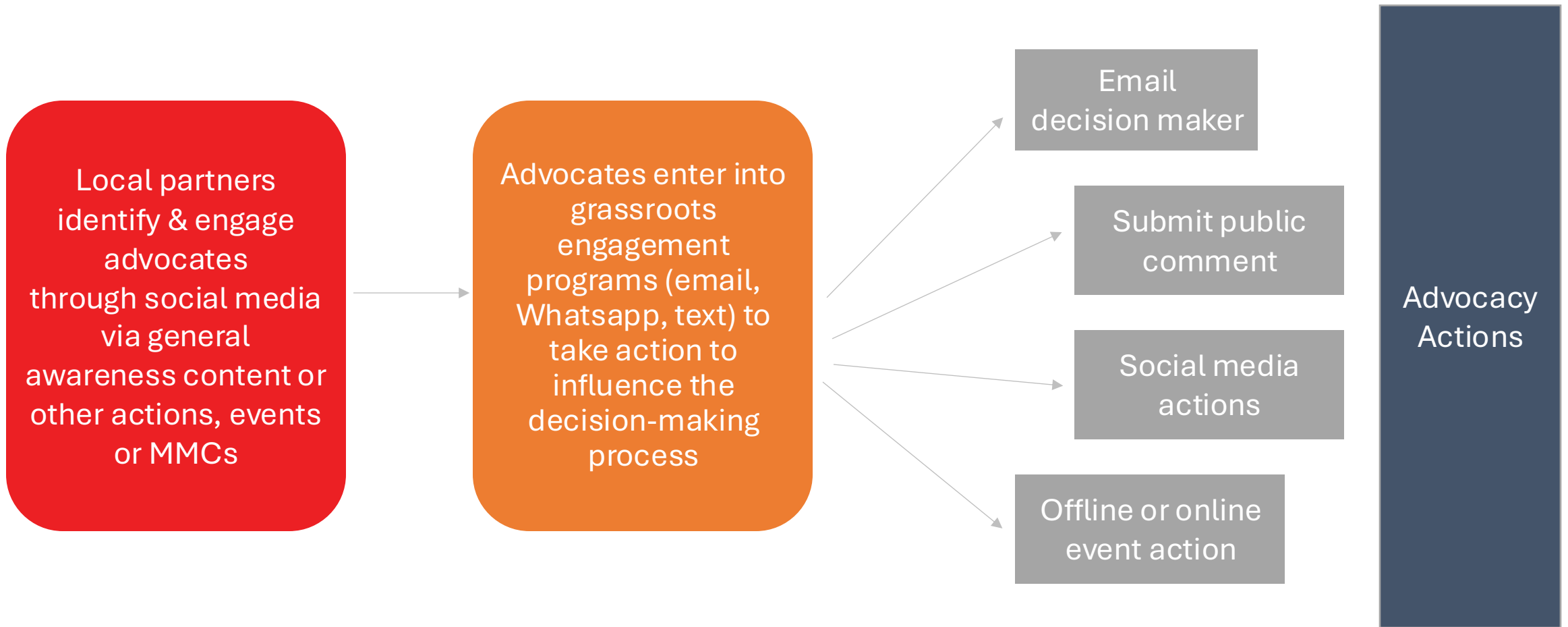
- Owned Relationship (list) versus Borrowed Relationship (social)

- Direct and Personal Contact Leads to Deeper Engagement

- Easier to Build/Maintain a Relationship

- Can be Easier to Activate Quickly

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How to Build a Team of Advocates

Local partners identify & engage advocates through social media via general awareness content or other actions, events or MMCs

Advocates enter into grassroots engagement programs (email, Whatsapp, text) to take action to influence the decision-making process

Email decision maker

Submit public comment

Social media actions

Offline or online event action

Advocacy Actions

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Discussion:

What benefits or challenges have you experienced while using your CRM tools so far?

CRMs:
What tech should I get?

Key Criteria in Choosing the Right CRM for you

- Should be easy to use

- Should work with your desired platform- WhatsApp and/or email

- Should be secure and allow you to comply with any privacy requirements in your country

- Should have easy -to- understand reports to help you figure out what's happening

- Likely no perfect solution, evaluate a few based on your priorities

Caveat on our Choices!

Please note we are unable to provide guidance on fundraising capabilities of CRM tools

If your organization has a grassroots fundraising program, you will need to include these needs as a critical component of your CRM search.

Evaluation Criteria for Choosing CRM Systems

Resources	Database	Communications	Action Tools
Staff Time, Capacity and Technology Comfort Level	Segmentation Needs	Email vs WhatsApp Outreach	Email Sign Up Tools
Monthly Cost of Toolset	Subscriber Management	Variety and Frequency of Outreach	Action Tools: Petition, Form-based advocacy recording
	Measurement and Engagement Reporting	Volume of Contact Sends	Target Tools: Email, Call, Text or Tweet to a Decision-Maker
			Event Registration

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HubSpot CRM Evaluation

Criteria	Evaluation
Ease of Use	**High**: HubSpot CRM is known for its easy-to-navigate interface and user-friendly design.
Database Functions	**Comprehensive**: Offers extensive database functions including contact management, segmentation, and data import/export.
Communication Tools	**Robust**: Includes Whatsapp integration, email tracking, live chat, calling, and email templates, integrated within the CRM.
Tools to Mobilize Action	**Marketing Focused**: Provides task automation, sales pipeline management, workflow automation, and task assignment. Does not have advocacy toolset.
Cost	**Variable:** Free basic plan available. Paid plans start at $50/month. HubSpot offers a 40% discount for non-profits.

Best For:

Organizations wanting to segment data and automate processes.

Mailchimp CRM Evaluation

Criteria	Evaluation
Ease of Use	**High**: Mailchimp is known for its intuitive interface and user-friendly design.
Database Functions	**Moderate**: Offers good database functions, but primarily focused on email lists.
Communication Tools	**Strong**: Excellent email marketing tools, includes templates, automation, and A/B testing.
Tools to Mobilize Action	**Moderate**: Focused on email marketing, offers basic automation and segmentation.
Cost	**Variable**: Free tier available. Paid plans start at $10/month. Discounts for non-profits available.

Best For:

Organizations with large email lists, multiple subscription streams and desire for easy to use templates.

Action Network CRM Evaluation

Criteria	Evaluation
Ease of Use	**Moderate**: User interface is functional but can be complex for new users.
Database Functions	**Good**: Strong database functions, especially for organizing activists and supporters.
Communication Tools	**Robust**: Includes email, text messaging, and social media tools.
Tools to Mobilize Action	**Advanced**: Excellent for mobilizing actions, event management, and campaign tracking.
Cost	**Affordable**: Pricing based on email volume. Discounts available for non-profits.

Best For:

Organizations looking for advanced advocacy actions online and event management.

Salesforce CRM Evaluation

Criteria	Evaluation
Ease of Use	**Moderate**: Powerful but can have a steep learning curve.
Database Functions	**Excellent**: Comprehensive database functions with robust customization options.
Communication Tools	**Comprehensive**: Includes a wide range of communication tools like email, SMS, Whatsapp and social media integration.
Tools to Mobilize Action	**Advanced**: Extensive tools for workflow automation, sales processes, and detailed reporting.
Cost	**Expensive**: Pricing starts at $25/user/month up to $500 per month for full marketing suite.

salesforce

Best For:

Organizations with dedicated technology staff comfortable learning complicated platform.

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Change.org and DoGooder Limitations

Data Ownership & Control: Change.org provides limited access to petition data, while CRM tools give full control over customer and supporter data. *(Do Gooder allows you to own your email lists)*

Customization: CRM systems offer advanced features like segmentation, custom fields, and detailed reporting. Change.org focuses on petitions, while Do Gooder provides more advanced tools.

Integration: CRMs integrate seamlessly with other platforms (email marketing, fundraising, etc.), whereas Change.org operates mainly within its own ecosystem.

Targeted Outreach: CRMs enable more personalized, targeted communications compared to Change.org's broader, public approach.

Email and WhatsApp

WhatsApp, Email, and SMS for Mobilization

- **Built for Action:** Driving a targeted audience to act and lead mobilization activities quickly.

- **Coordination:** Easy to organize and share resources coalition-wide

- **Movement Building:** Build a group of advocates.

- **Community:** Expand the relationship among the advocates who participate.

- **Owned Relationship:** By managing the relationship directly vs social media, easier to manage communication

Keys to Success for Email/SMS

LIST HYGIENE

Take the time and effort to keep your list current. Try to engage inactive names before deleting them. Also maintain efforts to add names.

LIST SEGMENTATION

Take some time and learn the behavior of the people on your list and tailor your communication accordingly.

TESTING

Spend time testing different components of your emails. Learning the ideal types of subject lines, length, and actions can help you build a group of committed activists

PRIVACY

Don't forget to learn about local regulations and laws governing data privacy! They vary from country to country but are an important part of every program.

WhatsApp for Mobilization

Keys to Success

STAFFING/TIME

Having a staff member who is responsible for WhatsApp and has the time to dedicate to a two-way conversation is critical to maintaining the channel

MODERATION

Conversations on WhatsApp are two way and it's important that someone is managing the chat to ensure it stay on track and on message.

TESTING

Don't be afraid to try different types of groups or different types of messages(links to articles/graphics/gifs)

PRIVACY

Don't forget to learn about local regulations and laws governing data privacy! They vary from country to country but are an important part of every program.

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WhatsApp Key Functionality: The Basics

✓ You can send attachments, pics, videos and links

✓ Max Photo Video or Audio: 16MB

✓ Max File Size: 100MB

✓ Max Characters in a Message: 65,536

✓ Max Number of Times a Message Can Be Forwarded: Can be forwarded in bulk 5 times, but after that it has to be forwarded to one person at a time.

Interviewer : do you have any experience in a leadership role?

Me : well, I am the admin for a Whatsapp group

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WhatsApp Functionality: What is Your Objective?

Based on the functionality of the program, there are two ways the platform can work for you:

Communicate with a core group of advocates, in the form of a group chat

Broadcast messages with information and action without allowing responses

WhatsApp For Business: The Basics

WhatsApp Business is a free app you can download to your phone.

Benefits of using Whatsapp Business:

- Whatsapp Business is a free app you can download to your phone.

- Benefits of using Whatsapp Business: analytics, workflows to CRM, easier replies that are automated

Limitation of using WhatsApp Business

- Limited to 1k messages per month for free

- May need to purchase software if you have many messages

- May have too many features you won't use

WhatsApp: Pro Tips

Adjust Group Settings to Limit Who Can Send Messages

Consider Location Based Groups

Ensure You're Not the Only One Commenting/Engaging

WhatsApp Functionality: WhatsApp Groups

- Can be used for a group of leaders who can quickly mobilize and potentially mobilize others.

- This type of group allows for interactions and conversations.

- Can generate a link to join this type of group.

- Because it is an open conversation, important the people who are invited to join are trustworthy.

- Max number of people in a group is 256.

- Group must be moderated

Multiple Groups: Structure Considerations
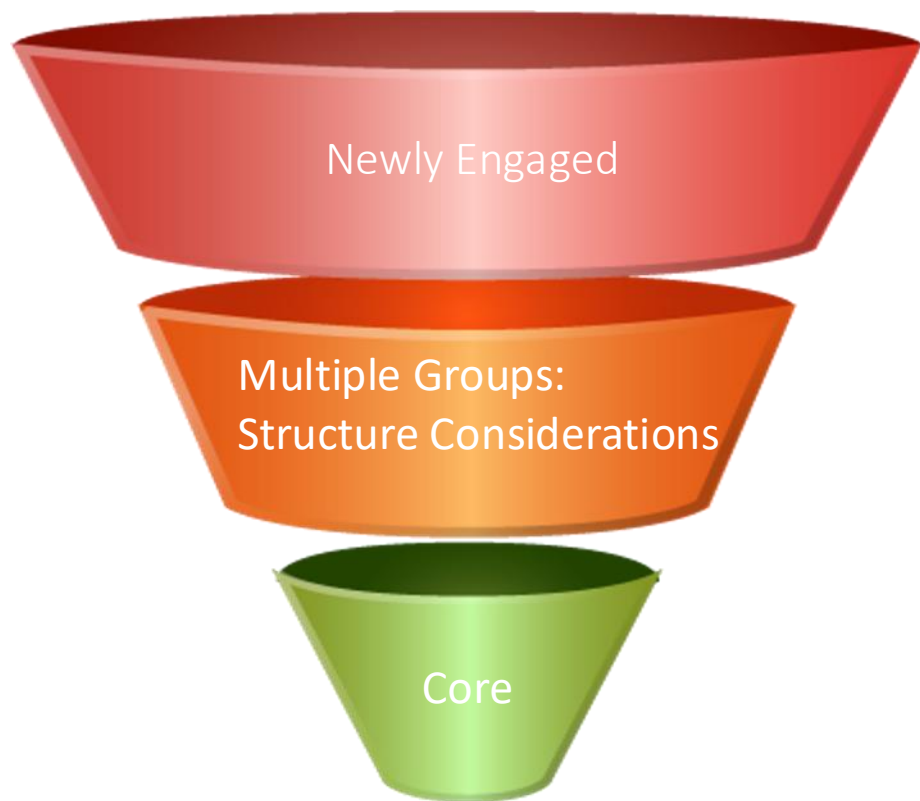
Newly Engaged: This is the group where people start. Focused on updates and calls to action. Can be a broadcast group if you prefer but should be a group focused on actions needed and campaign updates.

Campaign Specific Group : Useful if you are running a specific event/activity and coordination is needed. Can use to bring people into more engaged role from the general group. Max 15- 20 people.

Core Group: Most active and engaged activists. Focused on tasks and projects, strategizing. You probably already have a group like this but it includes mostly staff – consider creating one with one or two key volunteers.

Email vs. WhatsApp — Which platforms are you focused on and why?

- What's working well?
- What challenges are you facing?
- What new strategies or ideas would you like to explore on these platforms?

Examples of WhatsApp Mobilization

In New Jersey, the group Cosecha successfully advocated for undocumented residents to be able to apply for a driver's license.

Whatsapp, which was commonly used in the Hispanic/Latino community became a key driver in organizing people to attend events and pressure decision makers to pass

In 2014 the BBC set up an Ebola Crisis broadcast list, sending three health alerts daily. They publicized the following content, and had 25,000 users sign up to receive updates.

To subscribe, send 'JOIN' via WhatsApp to +44 7702 348 651 (you need to save this number in your phone's contacts first)
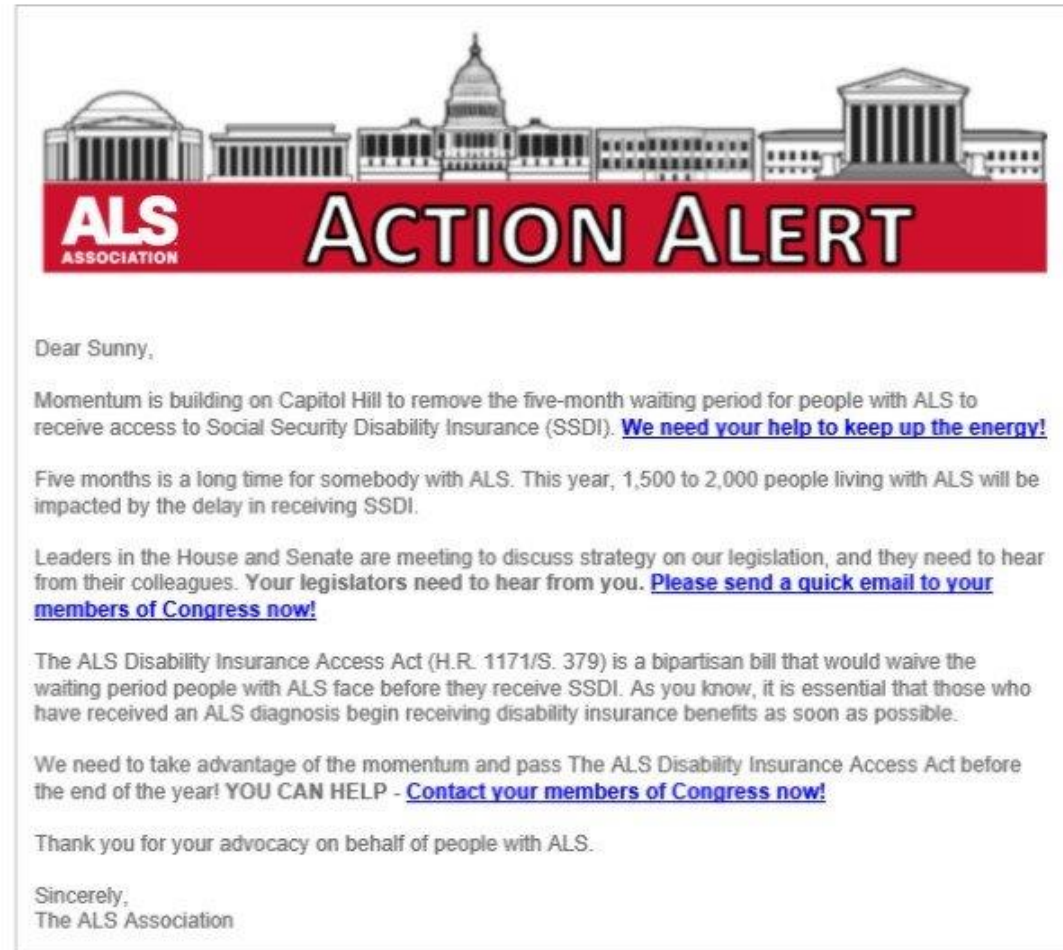
Examples of WhatsApp Mobilization

They used WhatsApp as a key form of information/communication like FB and IG.

They used Facebook, where they had a large following, to cultivate supporters.

CRM Example: ALS Campaign

CRM Example: Food Policy Partner in Brazil

Seamless website integration allows potential supporters to easily share their information with you, making it simple to stay in touch and build long-term connections.

Next Steps

- Assignment

- Questions?