Embrace the Change

By Michael Slaby Obama for America changed the landscape of national political campaigns. In 2008, we elevated digital thinking to be a central strategic pillar of the organization but did not have the time or resources to build much of our own technology. In 2012, we fully embraced the ubiquity of Facebook and power of Twitter, and with more time and capacity than in 2008, we set out to engineer our own solutions to problems that had plagued earlier campaigns.

Looking back on both campaigns, however, it's clear that the most important shift was the decision to integrate digital and technology comprehensively into our operation rather than letting them sit as separate departments cut off from the strategic process of the campaign as they had lived in the past. In a world where media and technology are shifting and converging so quickly we can barely keep up, integrating digital and technology with communications, program operations, and fundraising in particular was utterly essential. This increased integration with the media and technology landscape around us forced us to be more integrated internally, to be more thoughtful about our goals and needs, and to knit digital programs and technology platforms more closely to campaign outcomes.

But for smaller organizations and non-profits hoping to embrace digital and technology the way we did, wading through the mythology around the campaigns can be overwhelming. After helping to build the Obama teams, I now spend much of my time helping organizations — from the small but amazing to the global and extraordinary — do just that: use digital and technology as a force multiplier to expand their reach and to make their programs more efficient and more effective. Here are five innovations that all organizations can explore to help them move forward.

1. Let Tech People Solve Tech Problems

The first key to digital and technology innovation isn't about either digital media or some new technology. Getting these things right is fundamentally about getting the right people in the right positions to solve essential organizational challenges. In organizations that are not technology-based (in other words most organizations), leaders often figure out what they need on their own before telling the technology team to make it happen, rather than including them in the strategic process of defining the problem. It is a much better approach to involve your tech team in a conversation that starts, "we need to figure out how to make our events more effective tools for getting new people into the organization" than to task them to "create a new online event system that does x, y, and z." And this is just as true for a five person nonprofit as it was for the teams of hundreds we had working together on the campaigns.

Technologists and professional digital strategists think differently about problems than other members of the team and that perspective is incredibly valuable. We must have enough humility and trust to empower everyone in our team to do what he/she is best at. Including more people in the early stages of new challenges is much more productive than turning to them late in the process to resolve unforeseen problems. Start looking for solutions with big teams that include a broad set of perspectives and then pare down to a more nimble execution team – not the other way around.

2. Test Everything

Your mission and organization are unique. Your community is unique – what works in one community will not necessarily work in another. **The only way to be certain about what drives your community is to test and measure what you do and make sure to learn from what works and what doesn't by listening to data over anecdote.**

There are all kinds of optimizations that were important for the campaign that might make no difference for you. We even found things that shifted from 2008 to 2012 – like the most effective color for the donate button on the homepage. In 2008, our exhaustive optimization of the donation process led us to color the button red. In 2012, when we went through the optimization process again, we found that white worked better. Think of the thousands of donation opportunities we could have missed if we had been lazy and assumed that what had worked before would work again.

In working with a rapidly growing education organization that had deployed some direct learnings from our 2008 campaign, we discovered that mimicking those early successes was completely ineffective — new tests revealed wholly different best practices. The lesson: you may think you know your people and what will work with them, but how do you know? Most of our assumed "understanding" of our own organization derives from anecdotes that have festered into facts. Test and validate your assumptions.

3. The Second Circle

With 35 million Facebook fans and 26 million Twitter followers, the President has unprecedented capacity to reach and activate people via social media. But campaigns and advocacy organizations cannot let social media just be about preaching to and reactivating the choir. We realized early in the campaign that those millions are connected to nearly the entire voting age population of the United States. Empowering the President's fans and followers to effectively engage that second circle – the people they are connected to across the country but that we were not – was essential to growing our community beyond our committed base.

Most organizations still view Facebook and Twitter as media channels similar to their websites – another way to deliver messages and content to supporters. And while this is a good starting point, social media networks were designed as relationship platforms, not just content-delivery mechanisms. The most effective organizations recognize them as engagement opportunities for the activation of communities.

We built an entire platform around this principle called Targeted Sharing. It allowed us to connect our Facebook fans with people in their networks in more effective ways than just random sharing. Everything from helping fans reach their unregistered friends to just connecting with friends in battleground states made them more effective advocates for the campaign.

Few smaller organizations will be able to invest in the engineering and data resources for such applications. But just thinking of supporters as part of your organization who must be empowered to reach into their own networks is a great first step. This can be as simple as clearly articulating the need to reach new communities, or finding ways to incentivize recruitment. The goal is push the responsibility for growing your community down to the people who already support you.

4. Mobility First

You don't know and can't control where and when people will read, watch, or engage with you. By the end of the 2012 campaign, around 40% of our web traffic across all of our properties came in from mobile and tablet devices. This signifies an important shift in how and where people are consuming information, and you need to design programs and content that work for them.

When most organizations think about mobile, they immediately start into a discussion of SMS or smartphone apps. While these can be important parts of your outreach and engagement, mobile strategy starts well-before mobile-specific platforms. A great first step is to embrace the principles of "responsive design," making your site friendly to read and navigate via smartphones and tablets of all sizes. Then make sure your most important engagement points like your signup and donation processes are optimized for mobile devices. Forms like these are notoriously tough experiences on smartphones, so enabling efficient ways to speed up data gathering is important. It is also an opportunity to encourage people to pre-fill forms by connecting their Facebook profile.

Think Mobile

> Make your website friendly to read and navigate on smartphones and tablets

> Pay attention to important engagement points – like signup or donation pages – to ensure that they are easy to use on a mobile device

You might choose at some point to develop programs that are mobile-only, like the location-based network being built by a veterans support organization I work with that is entirely focused on a native application experience. But most organizations need to begin by making their existing experiences mobile-friendly. The effectiveness of your programs and fundraising depends on providing people an experience to fit the mechanism they use to engage with you.

5. Big Data in Little Organizations

The entire world seems obsessed with the possibilities unlocked by big data and analytics. Fundamentally, big data is about taking advantage of advances in computing technology that make processing large amounts of data easier, faster, and cheaper. It is often presented as a magic ingredient that will revolutionize everything about an organization. It may in fact revolutionize your organization but that revolution is likely to be more cultural than technological.

Inside the campaign, we had a huge analytics team responsible not only for things like electoral strategy and our internal polling program but also for inspecting the programs across the campaign in order to learn where we needed more effective or more efficient options. Compared to the work of most nonprofits, we had a simple task: our outcome was binary (we win or lose the election) and the units of measurement (votes) were well-understood and not under debate. That clarity and focus made evaluating programs simple ("How does this help us win? How does this get us more votes?"). But we still had to measure and create meaningful connections between programmatic metrics like calls made per team per weekend and dollars raised per email to our overall goal.

Quantifying audience and potential impact is an important first step to assessing and prioritizing programs. Some of our first conversations with a small cancer organization were dominated by the question "how do you know?" How do they know whether their programs are working? How many people are potentially affected by these diseases? How many have heard of their work? Starting big with basic census-level data about how many people might be in our target audience was an important step to putting their work in context and giving them a sense for how much impact they are having.

Being willing to ask probing, difficult questions about what is really working versus what just feels good is often a tough shift for organizations that are used to running on instinct and anecdote. Embracing self-critique and listening to the data is often the most important cultural shift available to small teams who lack the people and resources for ambitious big data projects. Take the time to understand what success means for your organization. Define quantifiable metrics that represent real success and connect your programs to your end goal. This exercise is powerful, even if you never take on something like creating a real-time measurement and reporting engine.

Make Big Data Work for You

- > Be willing to ask tough questions about what's really working, and listen to the data
- > Define success, using metrics to connect your programs to your end goal
- > Avoid adopting platforms or social media services just because they're new; evaluate whether they can really help your organization and whether your community is using them

An important corollary to defining success is doing only what matters. We always have more ideas and ambition than we have hours in the day or resources to apply, so we need to be extremely critical about using those resources to greatest impact. When it comes to digital and technology programs, "shiny object syndrome" is your worst enemy. Do not embrace platforms or social media services just because they are new and flying high on the tech blogs. Evaluate carefully whether they can help drive your organization and whether your community members (or potential new members) are currently taking advantage of them. It is important to try new things – but intentionally and with purpose.

Conclusion: Leadership Matters

In 2008, the Obama Campaign was primarily an opportunistic consumer of technology. In 2012, with the gifts of time and perspective, we built a team capable of engineering solutions to long-standing challenges in campaigns. We gave this team real and meaningful intelligence about our past experiences, but equally important we empowered them to think broadly about the challenges we faced. That balance between institutional awareness and new ways of thinking can be tricky, but it is important to get it right. This idea leads me to my last and overarching conclusion: **leadership is extremely important**.

Embracing and empowering technology in general, and analytics in particular, requires commitment and focus from the top. The cultural shifts that come from engaging in technology are disruptive. That disruption can be a good thing – a powerful force for reimagining what is possible and becoming the best version of ourselves. Or it can trigger destructive conflict that drains the team of energy and trust. Which one it is depends entirely on organizational culture and leadership. The Obama campaigns were led by campaign managers who understood that new ideas are necessary to win new campaigns in new eras. Similarly, non-profits need leaders willing to find the talent or develop the skills they need for the challenges and opportunities that are coming, not for those that have already passed.

Michael Slaby is amongst the world's leaders in digital strategy and technology and how they drive mission-driven organizations. Currently, he is a Fellow at Shorenstein Center at the Harvard Kennedy School of Government as well as an advisor to multiple for-purpose orgs, governments, and some of the world's biggest companies. In 2012, he rejoined the Obama Team as Chief Integration and Innovation Officer where he oversaw the CTO, CIO, CAO, and ensured effective integration of technology into the rest of the campaign. Previously he was the Digital Global Practice Chair at Edelman, the Chief Technology Strategist for TomorrowVentures, and was the CTO for Obama for America in 2008.