RESEARCH NOTE

DIGITAL TOOLKITS FOR CAMPAIGNING & ORGANISING.

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REVEILLE
STRATEGY

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ABOUT US

We help build new forms of power for workers & communities.

Formed in 2015, Reveille Strategy works with Unions and other membership organisations on strategy, public policy, governance, change, capacity building, technology, message design, campaigning and organising.

Reveille works with organisations that are committed to helping their members make transformative change in Australia.

Reveille has worked with many of Australia's largest unions, and NGO's in the environment, refugee and social justice areas.

The Directors of Reveille (Tim Lyons, Troy Burton and Kristyn Crossfield) have more than six decades of experience in Australia's unions as organisers, leaders, educators and strategists at local, national and peak council level.

The name is a nod to Reveille for Radicals by the pioneering community organiser Saul Alinsky.

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FOR MORE INFORMATION CONTACT

Tim Lyons | tim@reveille.org.au | 0418 533 501
Troy Burton | troy@reveille.org.au | 0428 436 924
Kristyn Crossfield | kristyn@reveille.org.au | 0425 275 860
Madeleine Holme | madeleine@reveille.org.au | 0411 319 412

WWW.REVEILLE.ORG.AU

INTRODUCTION

In the current environment, all Australian unions are actively thinking about how to take advantage of new technology to organise and mobilise workers.

A big part of Reveille's work with unions is to select new forms of technology, ensure they work effectively with other union systems, and to embed them into operational campaigns (political and industrial).

This has included CRMS, Blast Phone and SMS tools, Peer to Peer SMS, Field Campaign Management and Digital Mobilisation Platforms.

Reveille has a partnership with OURWalmart to further develop and roll out advanced organising technology in Australia and to provide immersion training for Australian online organisers involving live participation in active US campaigns.

Our main joint project is the Australian role out of WorkIt – an AI powered automated advice platform (accessible by Web browser, App and SMS) that is integrated with membership systems and is designed for community and group building, as well as implementing an online to offline organising strategy.

In relation to the acquisition and use of tech in the union context, there are a number of issues to be considered:

- The tension between single holistic platform, and key central crm with best of breed add-ons.
- The tension between data integrity and usability vs flexibility and customisation.
- ·Adapting political tools - e.g. nation builder - to workplace or industry organising is hard.
- Adapting tools developed overseas to the Australian context can prove challenging.

·A key risk is that tools themselves drive tactics – we do it because the tool is built to do it. We need to use tools for what they are good at and that we need them to do.

Set out on the following pages is analysis by Reveille of the possible scope of digital change and a taxonomy of tools. prepared to assist Australian to consider these issues.

THE SCOPE OF DIGITAL CHANGE IN UNIONS.

Adapted for union context from "The Meaning of Digitization" (2016, CEB)

PRODUCT

Changes to Membership or Services

Using data and technology to enhance existing models and services

Call centers
First gen CRMs

CRMS API link to other tech.

Genuinely new models of membership, participation and or services

Automated advice (AI)
New forms of membership
Community creation online

CHANNEL

Changes to Contact, Conversation, and Service

Improving channel coordination and performance

Basic websites
Online joins
Donations
Voter ID calls

Email list / petition builds
Blast SMS
Patch through calling
Use of models to target

Transforming channels to match behaviors and preferences of target universe

Peer to Peer SMS
Community Creation
Online to offline organising & mobilisation

OPERATIONS

Changes to Other Business Capabilities

Improving efficiency of organisational processes

Income automation
Low manual data input

Deep, real time data
CMS
Mobilisation tools
Event Management

Genuinely new models of membership, participation and or services

Map and manage online and offline campaign activity

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A TAXONOMY OF TOOLS.

Reveille has established a wiki for online collaboration on this kit. Link here.

FUNCTION	PLATFORM	FEATURES	USE CASE
CRM (Customer Relationship Management) Membership databases	Salesforce Unionware Unison Campaign Central (ALP) Imis Memforce	Member data, income management and fee payment, may link to industrial information, reporting.	Core requirement of membership organisations. Reporting and accountability.
CMS (Content Management System) Website platforms	Nationbuilder Squarespace Wordpress	Creation and management of digital content	House information, online actions, online join forms, supporter registration. Cookies can be used to re-target online advertising to people visiting a website but not signing up.
Field campaign management Manage organiser & volunteer field campaign work	Van/minvan uorganise Nationbuilder Campaign Central	Track conversations & conversions Mapping and planning Reporting Organising resources	Political and issues campaigns Organising campaigns
Digital mobilising **Online mobilisation and advocacy tools**	Nation Builder Action Network* Action Kit Blue State Digital tools Luminate Megaphone*	Petitions Advocacy emails and letters Letters to the Editor Event management Fundraising Payment platforms	Online mobilisation and advocacy tools
Email management	Nationbuilder Mail Chimp Campaign Monitor Blue State Digital tools	Email communications, testing and analysis	

REVEILLE STRATEGY

A TAXONOMY OF TOOLS (CONTINUED).

FUNCTION	PLATFORM	FEATURES	USE CASE
Social media	Facebook Instagram Snapchat Twitter LinkedIn	Targeted online advertising, Facebook groups, member and supporter lead generation via online engagement.	Facebook groups can be used for organising and building online communities. Sharing information and actions, promoting mobilisations. Instagram, Snapchat and Facebook can all be used for targeted advertising to potential members and supporters. LinkedIn can be used to identify and contact potential members by industry.
Social media matching	Attentive.ly Searchisback.com Sociograph	See what members and supporters and saying online, identify influential social media users. Find people on Facebook based on location, job or mutual friends. Analyse and compare the social media activity level of your supporters.	Find and follow current and potential members and supporters online, match member and supporter data to public social media accounts to enable alternate ways of contacting people, identify potential activists and leaders.
Social media analytics and management	Hootsuite Google Analytics ShortStack	Manage social media accounts, track mentions, analyse results and reach. Message blast to large numbers of people	Optimise online engagement by tracking trends and learning what content generates the best responses and amongst which audiences.
Blast SMS	Callhub Twilio ReachTel*	SMS organisiNg conversations	Outreach at scale for mobilisation, information sharing and voter outreach.

A TAXONOMY OF TOOLS (CONTINUED).

FUNCTION	PLATFORM	FEATURES	USE CASE
Peer to Peer SMS	yabbr* Hustle Relaytxt	SMS organising conversations	Organising, mobilisation, member to member/potential member conversations.
Automated and patch through phone calls	ReachTel CallHub	Automated landline and mobile calls. Optional patch through to call centres or publicly listed phone number	Outreach at scale for mobilisation and voter outreach. Transfer interested people through to an operator or call centre to have an in-depth conversation.
Automated member / supporter engagement	Autopilot Zapier	Connect various digital tools to allow them to share data across platforms. Automate follow up to members and supporters.	Direct advocacy calls to key decision- makers Add new supporter/member information to relevant email lists, automatically send new members or supporters a welcome email or SMS, automate congratulation messages when people take an action.
Automated advice and community creation	Workit	AI powered automated advice Web App and SMS access CRM connected Community / group building	Automation of industrial advice to organised workers Outreach at scale to unorganised workers Platform for group building