

NationalJournalMembership

STRATEGIC RESEARCH SERIES

THE NEW TOOLS OF ADVOCACY

*Lessons for the Policy Community
from the First Wave of Social Media Adoption*

Lessons & Best Practices

- Tracking Emerging Issues
- Identifying Online Influencers
- Positioning Opinion to Get Noticed
- Defending Against Social Media Attacks
- Empowering Staff for Impact Advocacy
- Extending Online and Offline Value of External Partners

National Journal Membership Research Staff

Project Director

Gina Kim

Principal Researchers

Aaron Young

Jason Miller

Natalie Bamdad

Anna Lynn Doster

Executive Director

Nick Reding

Advisors

Derek van Bever

Scott Bohannon

Pope Ward

Designer

Jenna Fugate

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2012-2013 Social Media Publication Series



THE NEW TOOLS OF ADVOCACY

Lessons for the Policy Community from the First Wave of Social Media Adoption

Executive Summary

High-level overview of key findings from our yearlong investigation into uses of social media in policy advocacy. This report is designed for Washington-based heads of office, as well as board members and stakeholder executives.



THE NEW TOOLS OF ADVOCACY

Lessons for the Policy Community from the First Wave of Social Media Adoption

Feature Best Practice Study

Full-length research study exploring practices of advanced social media users in policy advocacy. The study is organized around three key social media competencies: surfacing new organizational risks and opportunities, strengthening reputation through strategic online engagement, and leveraging online supporters to maximize influence. This report is designed for Washington-based heads of office, directors of Government Affairs and Communications, and digital media managers.

TODAY'S REPORT



100-DAY SOCIAL MEDIA PRACTICUM

Accelerated Learning Plan for Novice Users in the Public Policy Profession

Implementation Toolkit

Workbook offering step-by-step guidance for policy professionals in achieving social media proficiency. This report is designed for senior Government Affairs staff, senior Communications staff, grassroots strategy administrators, and social media community managers.



SOCIAL MEDIA CAMPAIGN PLAYBOOK

Turnkey Process for Launching Social Media Complements to Traditional Advocacy Campaigns

Implementation Toolkit

Overview of a successful social media campaign-building process, including a playbook built upon proven tools and techniques of experts in digital advocacy. This report is designed for policy campaign architects, campaign managers, and social media community managers.

Further Assistance

If you have any questions related to this study, upcoming publications, or other issues, please do not hesitate to contact National Journal Membership staff. Comments and inquiries may be directed to Aaron Young, Research Director, at ayoung@nationaljournal.com or 202-266-7488.

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Reading Time

Full Text Reading.....120 Minutes

Skim Text Reading.....30 Minutes

Advisors to Our Work

AARP
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American Association of University Women
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Mr. Andy Amsler

Director, Digital Media
Podesta Group

Ms. Elizabeth Avery

Vice President, Global Public Policy
and Federal Government Affairs
PepsiCo

Mr. Joe Briggs

Public Policy Counsel
and Manager of Government Relations
NFL Players Association

Mr. Christian Clymer

Deputy Vice President, Public Affairs
PhRMA

Mr. Rich Deem

Senior Vice President, Advocacy
American Medical Association

Mr. Neal Denton

Senior Vice President, Government
Relations and Strategic Partnerships
American Red Cross

Ms. Lindy Dreyer

Chief Social Media Marketer
Social Fish

Ms. Maddie Grant

Chief Social Media Strategist
Social Fish

Ms. Tammy Gordon

Director, Social Communications
and Strategy
AARP

Mr. Richard Green

Managing Director, Public Affairs
American Dental Association

Ms. Wendy Harman

Director of Social Strategy
American Red Cross

Ms. Leikny Johnson

Director, Web Content and Communications
American Society of Civil Engineers

Ms. Reshma Mehta

Senior Advisor
AARP

Ms. Amy O'Connor

Director, Digital Government Affairs
Eli Lilly and Company

Mr. John Russell

Managing Director, Advocacy and
Public Affairs
SNR Denton

Ms. Lauren Swartz

Social Media Specialist
American Society of Civil Engineers

Mr. Nate Tibbits

Chair, US Public Affairs
Burson-Marsteller

Ms. Mary Catherine Toker

Vice President, Government Relations
General Mills

Mr. Erik Winborn

President
Winborn Solutions

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Statement of Purpose

A YEAR'S RESEARCH ON SOCIAL MEDIA

For more than a year, National Journal Membership's research team has devoted significant study to the opportunities and threats posed by social media to Washington policy professionals. The scope of our inquiry has been expansive: Where—if anywhere—can social media strategies provide advantage in a public policy context? To which “jobs” are social media most effectively applied? Which traditional advocacy activities—if any—will be eliminated as a result? Do social media “persuade” as well as other advocacy channels?

While our efforts have been guided in equal measure by social media enthusiasts and cynics, our posture in the research has always better matched that of the cynics; for the benefit of our Members, we approached each anecdote and trace of evidence with a skeptical eye, striving to separate reality from hype.

Now closing out our first foray into the matter, we are convinced that social media can indeed play a powerful role in Washington advocacy. Not because social media—particularly Twitter, Facebook, and LinkedIn—have finally “mainstreamed” in Washington, but because these media have again and again represented a potent (often hidden, sometimes decisive) force behind the changing tides of recent legislative battles. The debate over the Stop Online Piracy Act (SOPA), of course, is the best known example. But numerous others—in the food industry, in pharmaceuticals research, and so forth—have been won by non-traditional players made faster, more agile, and ultimately stronger by their social media savvy.

Counter to the prevailing sentiment, we also found strong evidence that social media tools favor no particular professional, demographic, or organizational type in their utility. Across the corporations, associations, and client firms—small and large, newly-arrived and legacy—consulted in our work, we found policy professionals successfully leveraging social media tools to advance their personal and organizational effectiveness.

Given the many emerging opportunities presented by social media tools—as well as threats faced by those who do not adopt them—we believe that the time for thoughtful engagement is now. The volume and intensity of digital advocacy efforts will only grow; recent upstarts are continuing their digital strategies in full force, and long-powerful inside forces are joining the fray, learning to exploit digital tools to find, channel, and amplify new influential voices. And those still on the sidelines would do well to note that coming up the curve is not the work of a day, a week, or even a month. Undertaking the painstaking process of developing an active online community, and overcoming the “wrong instincts” for social media engagement held by many policy professionals, will rule out fast wins. Organizations that wait to engage—especially while the center of gravity is shifting—do so at their own peril.

NEW TOOLS IN CONTEXT

As to their place in the modern advocacy toolkit, social media tactics should be viewed as supplements rather than replacements for traditional advocacy approaches. As components of surround-sound, multi-media strategies, these tactics have unique and profound value...but they are not a panacea for all advocacy challenges.

For the great many Members who are more comfortable in the lobbying world than the digital media world, playing effectively in both spaces may feel like a wildly divergent mandate. There is, however, good reason for Government Affairs to pursue both tactical agendas simultaneously: Among all advocate types to benefit from the capabilities of new digital tools, the Washington-based Government Affairs officer stands to benefit most. While advocacy upstarts may currently possess more advanced social media talents, they simply cannot replicate the know-how that Washington professionals have built over years in the field—at least, not overnight. In the policy arena, winners and losers will be differentiated not by social media skills alone, but also by the experience and judgment that can be leveraged across emerging media channels and strategies. Legacy players can quickly learn the benefits of social media while neutralizing its risks, giving those with deep policy expertise a substantial competitive advantage.

ORIENTATION TO THIS VOLUME

Seeking to match the threats and opportunities confronting our Members with targeted guidance and advice, National Journal Membership’s research team has reported, across the pages that follow, a handful of best practices for leveraging social media to support policy advocacy.

Compiling a volume worthy of our Members’ time—one that details the work of successful first-movers in Washington, and provides proven, actionable guidance to Washington professionals as they navigate, invest in, and harness the potential of Web 2.0—was far from a superficial effort. Our aim in the research, as always, was to go well beyond codifying the “things people are doing.” Principally, we were driven to expose the things policy professionals are doing differently to achieve high impact—from gaining advance warning on issues through effective social media monitoring, to amplifying the voice of citizen advocates, to mitigating risks of brand exposure in social media channels. And so today’s study represents findings from both a broad and intensive inquiry, which included consultation with over 1,000 professionals, in-depth research interviews with nearly 150 social media practitioners, and an examination of more than 500 articles, reports, and other studies on the topic of social media.

The lessons and best practices that comprise *The New Tools of Advocacy* were written with our diverse audience in mind. Some are strategic and will largely constitute a senior leadership agenda. Some are highly operational and will inform the day-to-day work of social media community managers. Each, however, contributes to an organization’s ability to advance policy priorities through smart social media engagement. And, used together, all project a potent force for improving organizational performance.

If there is a regret in this work, it is that we could not profile all of the compelling concepts we came across in our research. Today’s writing, therefore, represents a first-of-series. At the direction of the Members, we look forward to continued publication and member service in this terrain in the months and years to come.

National Journal Membership
August 2013

Start

February 2012

1. Topic Selection



Poll Members to identify primary pain points shared broadly and deeply by advocacy professionals

2. Literature Review



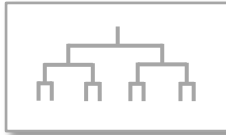
Review conventional wisdom as it relates to top Member problems, both inside and outside the Beltway

3. Scoping Interviews



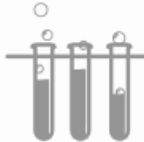
Establish scope of research study based on Members' descriptions of the problem as they confront it

4. Root Cause Analysis



Differentiate between superficial symptoms of the identified problem and the real underlying causes

5. Hypothesis Testing



Develop provocative, testable hypotheses and a plan to assess them in subsequent interviews

Going for the Details

Our Approach to Research

- **Qualitative at the Core**
Hardest questions resist formulaic study; rigorous qualitative analysis is the only real way to grasp the reality of work that is certainly as much art as it is science
- **Oriented around the Experts**
Prioritize interviews with frontline practitioners; greatest insights tend to reside in their experience and in their observations from actually doing the work
- **Buttressed by “Science”**
Wherever possible, deploy quantitative methods—surveys, data analysis, etc.—to both guide and “gut check” the more qualitative work from start to finish
- **Contestable by Its Nature**
The work is essentially normative and evaluative; right answers are invariably elusive and nuanced; by its nature, the work is open to—and enhanced by—criticism and reconsideration

in Brief

Asking the Experts

“In Your Experience...”

- Have you used any social media tools to support achievement of your advocacy agenda? If so, which tools have been fruitful?
- Are you listening regularly to social media dialogue, and have you incorporated what you learn into your messaging strategies?
- Has social media provided your organization with new capabilities or is it mostly allowing you to do traditional tasks more cheaply and quickly?
- Have you shifted budget dollars/resources to build greater social media capabilities across the previous 12 months?
- Have you seen clear benefits, return on investment from your use of social media that justify further commitment to it?
- Has social media enabled you to better mobilize non-traditional advocacy players, specifically voices outside the Beltway?
- Are policymakers proving to be attentive to the things they hear about or are presented with via social media?
- Have you noticed any peer organizations in Washington that have been particularly innovative in their use of social media?

Evergreen Terrain

Fall 2012 & Beyond

10. Member Meetings



Present research to Membership at Member Summit events

9. Preview Meeting



Convene small group of Members to pressure-test utility of selected practices and broader teaching plan; revise presentation materials in response to Member feedback

6. Tactic Interviews



Conduct interviews with leading practitioners to identify practices that could dispose of important root causes of problem

7. Research On-sites



Visit most-advanced Member organizations to gain detailed understanding of their activities

8. Practice Briefings



Isolate “active ingredients”—the insights that separate case organizations’ behaviors from rest of Members; assess impact and applicability of each organization’s experience

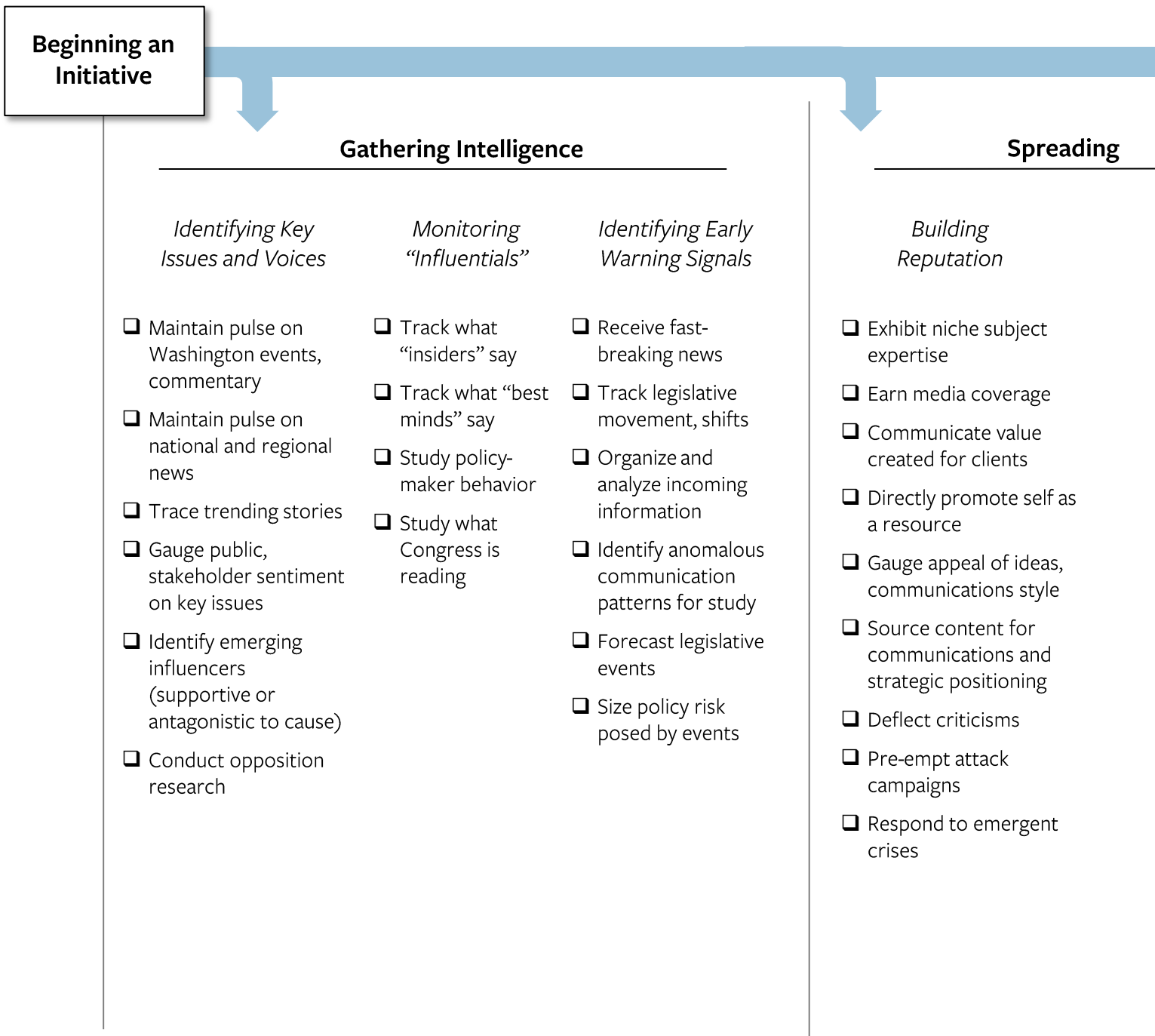
Study in 20

- #1 *Social Media Engagement No Longer Optional*: The advocacy opportunities and liabilities introduced by social media are forcing most Washington offices to engage in online policy discussion
- #2 *Helpful Tools, but No Panacea*: Smart social media investments can greatly strengthen an organization's policy positions, but seldom will they replace traditional advocacy tactics—such as shoe-leather lobbying—wholesale
- #3 *Vital Participation of Government Affairs*: Infusion of Government Affairs expertise into social media efforts significantly advantages digital advocacy work; in fact, Government Affairs involvement can be the decisive factor in campaign wins—especially in battles against upstarts
- #4 *Value in Simply Listening*: Observing the online habits of important stakeholder groups—allies, opponents, subject-matter experts, the public, policymakers—offers unprecedented opportunity to understand how the narrative of key stakeholders develops over time
- #5 *Power Maps Are Being Reshaped*: Traditional markers of influence—credentials, proximity to power, resources—do not apply in the social media context; thus, maps of influence take new shapes in online spaces
- #6 *New Influentials Are Emerging*: “Issue-makers”—individuals who are disproportionately powerful in driving online policy discussions and shaping opinions on emerging issues—are sometimes wholly unknown to Washington professionals and traceable in social media alone
- #7 *“Sharing” as the Core Influence Metric*: Influence in social media is best identified not by looking at an individual's followers or mentions, but by his or her performance on measures of sharing (e.g., retweets, likes); measures of sharing provide the best gauge of one's ability to advance conversation with resonant, trustworthy content
- #8 *Traceable Paths to Persuasion*: Organizations can map the relative importance, proximity, and interactivity of community members within a social network by tracking sharing patterns; understanding interactivity—and particularly the direction of sharing activity—powerfully illustrates many paths for reaching top influentials
- #9 *Filtering for Authenticity and Substance*: Adopting mechanisms for sifting through social chatter to find authentic, credible voices is critical to organizational efficiency; without a strong filtering process, the volume of social media conversation can be both overwhelming and misleading
- #10 *New Sources of Predictive Intelligence*: Social media is peerless in its ability to illuminate patterns of behavior among individuals and communities; with practice, users can recognize meaningful breaks from behavioral conventions—representing significant changes in stakeholder opinion, competitor tactics, and so forth—and adjust plans accordingly

Conclusions

- #11 *Muscle Memory Fails*: Adhering to “offline instincts” when speaking online can be extraordinarily isolating; in worst cases, these instincts actually work *against* the organization’s ultimate aims
- #12 *New Rules to Play By*: A variety of unique conversational strategies—including anticipatory acknowledgment of bias, avoidance of “hierarchical” behavior, and others—must be learned and applied to gain access to, and credibility in, important digital discussions
- #13 *Changing Optics, Not Minds*: The best opportunities for persuasion using social media lie in creating context around issues and framing debates; social media are not terribly effective tools for changing the minds of the highly opinionated, but they can be used to shape the broader environment into which lawmakers’ decisions are made, making it harder to resist particular points of view
- #14 *The Quintessence of Human Voice*: Individual voices are more powerful than brands or organizations in social spaces; eschewing “corporate speak”—and at times eliminating the visible role of the organization in the conversation altogether—allows messaging to travel farther
- #15 *Co-Opting Quality Content*: Personal stories and emotionally compelling content are shared widely in digital media, and should be anchor features of online advocacy work; strategies to solicit or find these stories within the online community, capture them systematically, and leverage them through multiple online and offline channels enhances the resonance of campaigns
- #16 *Riding Conversational Waves*: While it is often impossible to (deliberately) manufacture viral discussion, organizations can expand visibility and reach by attaching their own messages to already-trending online conversations; one requirement here is to take part in such conversations wherever they are occurring—i.e., perhaps on platforms other than your own
- #17 *Relaxing Control*: Proactive engagement of staff members and stakeholders in social media can expand the organization’s access to new, hard-to-penetrate communities; however, engagement at scale cannot be accomplished without encouragement from leadership and decentralized authority for speaking online
- #18 *Donning Thicker Skin*: Deleting harmless criticisms on social media can destroy a user’s credibility and provide yet another basis for criticism; criticisms are inevitable online, and sensitivities should be moderated among those who choose to participate in social media
- #19 *Disarming Destructive Situations*: With early warning systems in place, it is often possible to predict and head-off trouble before it becomes perilously negative or personal
- #20 *Community as First Line of Defense*: When attacked online, an individual’s or organization’s community will often rise to defense; because community response can be the quickest and most effective means of squelching unfair attacks, advanced players pause to allow community self-policing before directly engaging critics

A Tool with Many Pastures of Relevance for



Applications

Public Policy Professionals

**Real-World
Influence**

Your Message

Building Relationships

- Identify emerging client and stakeholder priorities
- Expand lists of issue/position sympathizers
- Make new connections (clients, donors, advocates, etc)
- Facilitate stakeholder-stakeholder relationship-building
- Build and manage coalitions
- Micro-target communications
- Exchange support, validation to deepen existing relationships
- Manage client service, satisfaction
- Keep contacts “warm”

Inflecting Debate

- Broadcast positions to the public
- Brief stakeholders and constituents
- Insert the organization into ongoing dialogue, debate
- Build new dialogue, debate
- Highlight facts, stories, figures to frame a narrative
- Respond to opposition, misinformation
- Nudge conversations in different direction
- Defuse negative conversations before they “crest”
- Respond to/shape opinions of latent listeners

Driving Action

Triggering Online Advocacy

- Broadcast calls to action
- Inform, mobilize supporters quickly
- Promote cause(s) across groups
- Facilitate “virtual” lobbying, petitioning
- Reinforce community support (conferring social capital)
- Stimulate community sharing, peer recruitment

Triggering Traditional Campaigns

- Size public support / opposition
- Highlight overlooked issues
- Create compelling arguments with constituent-derived content
- Recruit stakeholders to offline events, advocacy actions
- Arm representatives for discourse, direct negotiations
- Inform traditional media strategy

I

THE BUSINESS CASE FOR SOCIAL MEDIA ADOPTION NOW

National Journal Membership Essay

- A Watershed Moment
- The Hill is Acting
- Ample Early Discovery
- A Steep (Re-)Learning Curve

▶ **Conclusion #1**

At the time this study was initiated, members of the Washington advocacy community were almost unanimously considering the opportunities and threats presented by social media in the Capital

▶ **Conclusion #2**

Noteworthy Event: In National Journal Group's years of research, this marked the first time that a single new communications regime had captured full attention of the market

▶ **Conclusion #3**

Primary Driver of Market Interest: The landmark clash over SOPA provided a first look at the potential of social media as a potent advocacy tool; early adopters demonstrated that channeling of popular opinion through social media can have the power to derail legislation

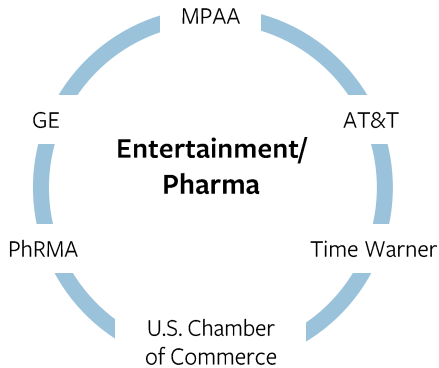
▶ **Conclusion #4**

More impressively, the SOPA saga showed that even well-supported bills are not safe from opposition that is focused and amplified across vast social networks; well-financed and well-lobbied legislation, in this case, was upended by a (previously inert) community that relied heavily on digital tools to stress disfavor

▶ **Conclusion #5**

While post-mortem interpretations of SOPA have ranged from "anomaly" to "evidence of a new world order," National Journal Membership's view is that SOPA events illustrate, at a minimum, the significance of social media as instruments for monitoring public sentiment, stoking passions of an engaged community, and empowering outside-the-Beltway forces in Washington advocacy

SOPA Demonstrates that Social Media Three Communities



Established Washington players quietly work for months to craft and introduce an IP protection bill

Companies lobbying for SOPA hire 241 lobbyists (for \$104.6 MM) in Q4 2011

FOR



AGAINST

12

2

10/26/2011
SOPA
introduced

24

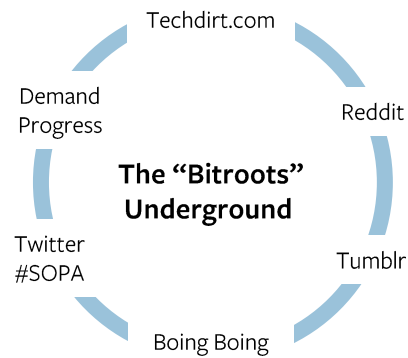
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11/16/2011
House
Judiciary

31

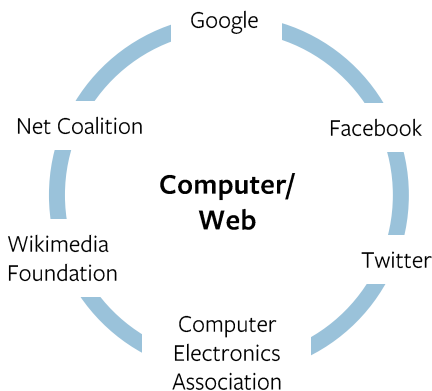
21

12/15/2011
House
markup



Tech bloggers raise alarm about consequences of SOPA months ahead of its introduction

Underground community tries with little effect to engage Entertainment lobby and urges social tech giants to act



Big internet interests double their past lobbying efforts, hiring 246 lobbyists in Q4 of 2011

Major technology firms send a joint letter to Congress as part of a campaign of online and offline efforts

Can Change Legislative Outcomes

Engage

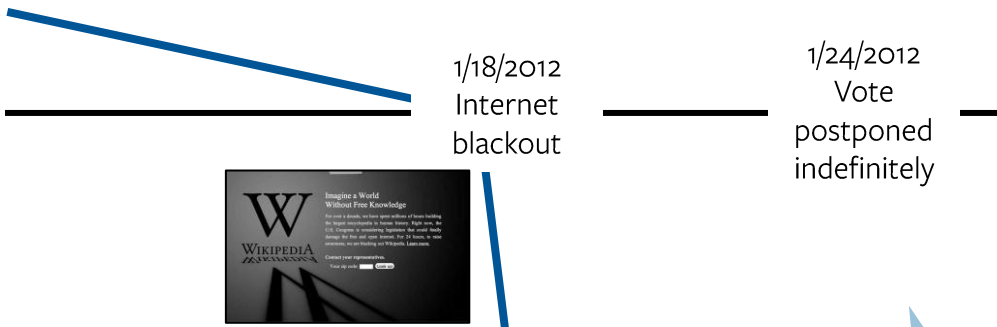
After several bill sponsors change sides, Entertainment lobby offers to engage Web community

“Google made its point. They’re big and tough and we get it. Now hopefully reasonable minds will prevail.”
John Fithian, NATO

What’s the Lesson?

Anomaly?

- Engaged online audience
- No entrenched partisan positions
- One side owns Web information gateways



New World Order?

- U.S. population turning to social for opinion formation
- Other influence levers in decline
- Rise of social “pure plays” in advocacy

On the day of the blackout, “Bitroot” community stages offline protests

“It was the users who urged companies to oppose SOPA/PIPA, not the other way around.”
Mike Masnick, Techdirt

Growing Niche?

- “Bitroots” community highly engaged on narrow set of Web issues
- Their activism is highly visible
- “Digital” terrain is growing

Biggest online firms lead blackout of more than 115,000 Websites in protest of Web censorship

“Their goal is reasonable, their mechanism is terrible. They should not criminalize the intermediaries.”
Eric Schmidt, Google

New Tool

- Lowers barriers to community activation
- New source of policy intelligence
- Complements traditional influence strategies

Window into Social

- Structure of online communities
- Differences between effective online and offline behavior
- Dynamics of content sharing



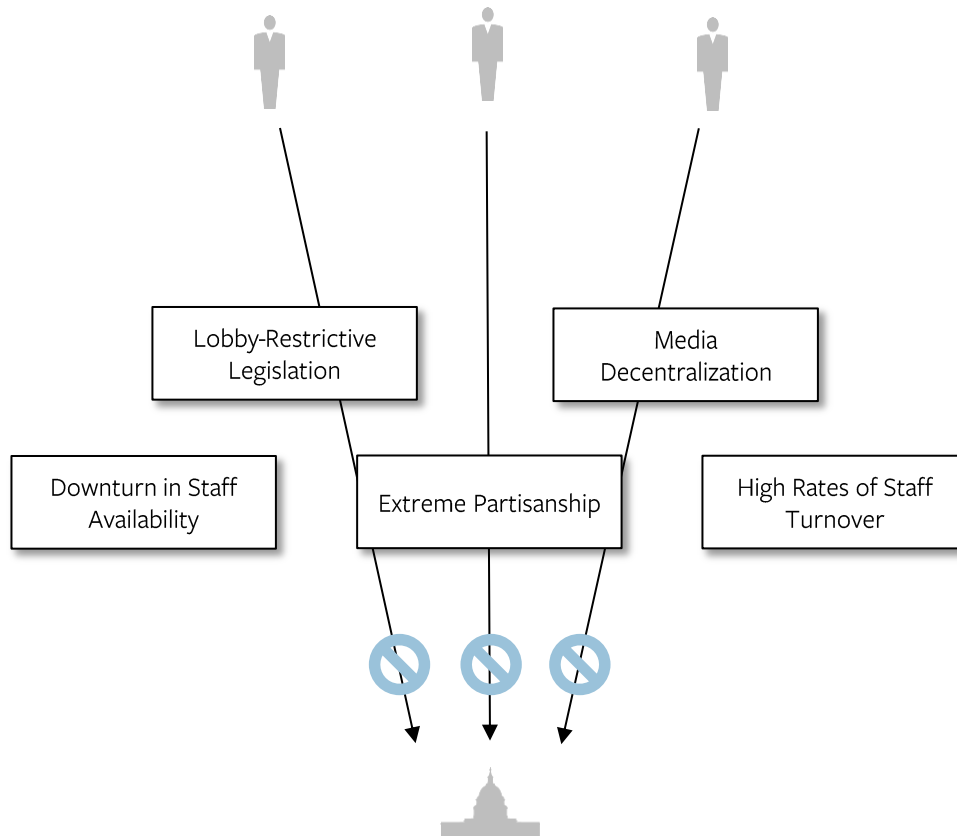
► **Conclusion #6**

If social media can offer any advantage, they are welcome tools in a time of great challenge; a host of recent trends—restrictions on lobbying activity, media decentralization, decreased access to hill staff, and extreme partisanship, for example—have dulled the effectiveness of traditional advocacy approaches

Buffeted by Disruptive Trends

Forces Disruptive to the Government Affairs Function

Sample

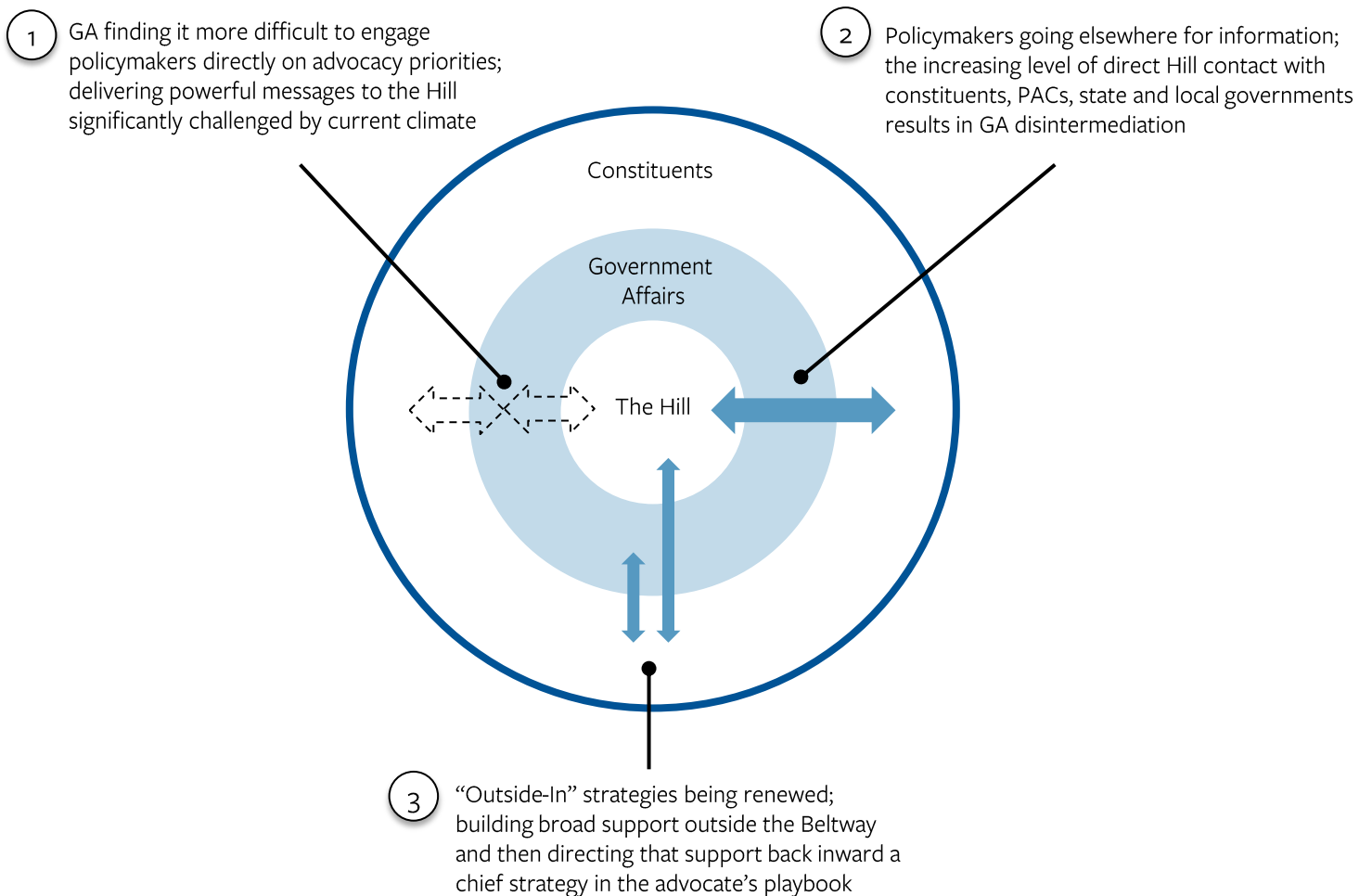


► **Conclusion #7**

The distinctive usefulness of social media in emphasizing third-party voices creates new opportunity to draw policymaker attention in an otherwise cluttered media environment; particularly as policymakers look more frequently to the public, PAC contributors, and state and local governments for inputs, social media are well-leveraged for capturing, focusing, and relaying to decision-makers the perspectives of many stakeholder communities

A Changing Model of Influence

Emerging Routes to Legislative Impact



Approaches Suggested by Emerging Models

- ✓ Surround-Sound, Multi-Media Campaigns
- ✓ “Voice of Constituent” Amplification
- ✓ Grass-Roots Activation

► **Conclusion #8**

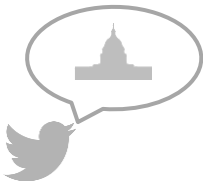
Despite their utility, many Government Affairs professionals often are reluctant to adopt social media tools for advocacy work; anxiety about the assumed liabilities—hope, even, that the undertaking can be delayed until a younger generation of advocacy executives rises—is not uncommon

► **Conclusion #9**

Evidence from research suggests further postponement is a mistake; there are three strong arguments for pushing forward now

The Adoption Logic for Government Affairs

**Argument #1:
The Hill
is Acting**



Members of Congress are swiftly adopting and using social media tools in their day-to-day work

**Argument #2:
Ample
Early Discovery**



Peer organizations already exploiting social media to gather intelligence, spread messages, and drive action

**Argument #3:
A Steep
(Re-)Learning Curve**



Organizations discovering that social media proficiency requires new skill set

Argument #1: The Hill is Acting

▶ Conclusion #10

First Argument: With no regard to party, age, or tenure, Hill staff members are incredibly active on social media; as of this writing, 93 percent of members of Congress have opened Twitter accounts

▶ Conclusion #11

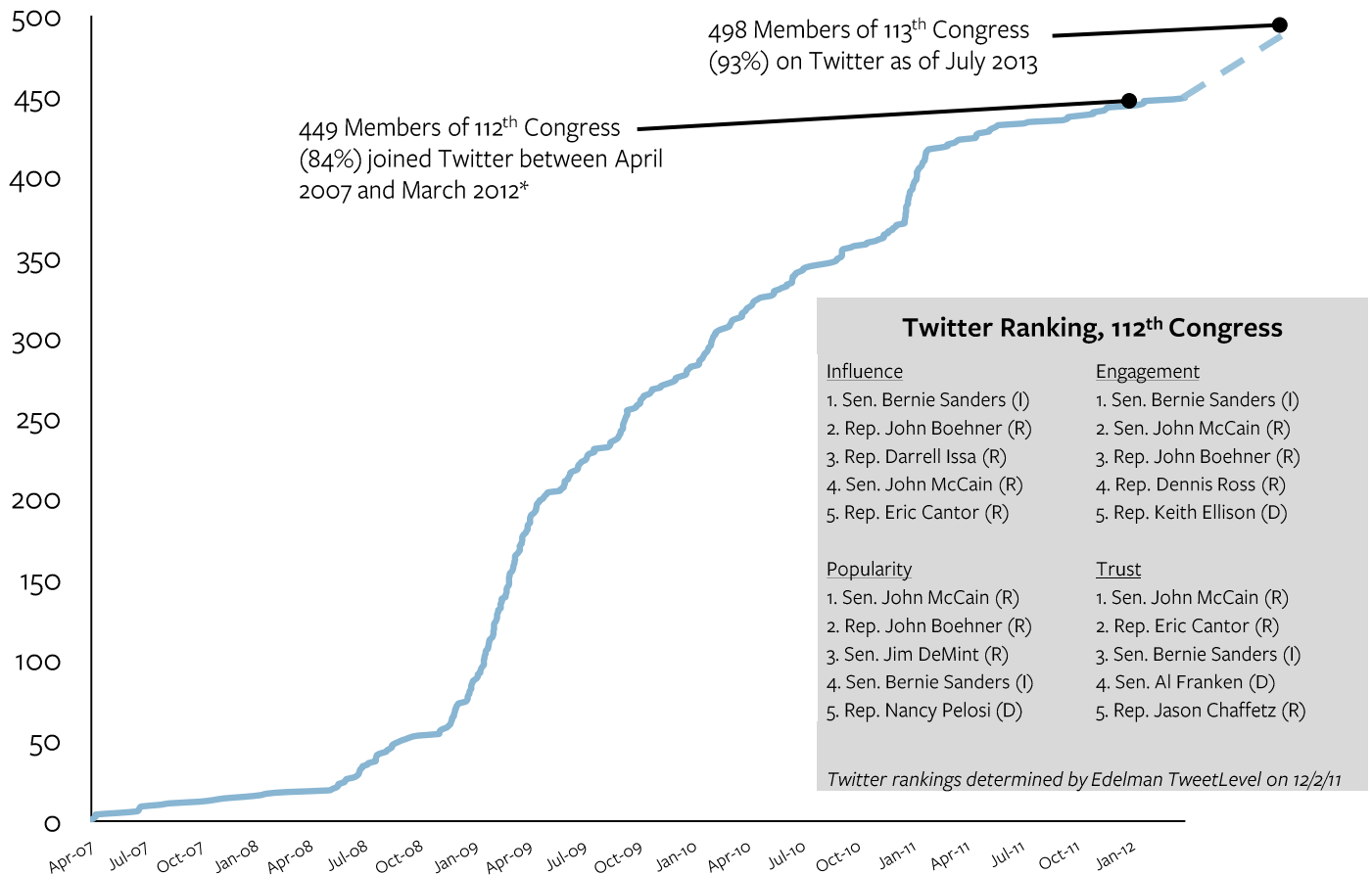
All signs indicate that social media usage by Congressional staff will only increase moving forward; each new election brings greater social media savvy and interest to the Hill

▶ Conclusion #12

As to use, Congressional messaging is not just “repackaged PR”; surveys and anonymous interviews of Hill staff have confirmed that most Members of Congress are now genuinely engaging in social media, and personally managing some portion of their own social media presence (vs. repeating talking points or outsourcing comment to junior staff)

Few Strangers on the Hill Vast Majority of Congress is on Social

Members of Congress on Twitter



*Analysis only reflects the date of the first Twitter account established.

Source: Edelman, “Capitol Tweets,” 2012; National Journal Membership Research interviews and analysis.

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► **Conclusion #13**

Beyond Broadcast: More surprisingly, social media use on the Hill is not solely—or even mostly—dedicated to promoting legislative agendas; social media are most commonly used as listening and learning tools

► **Conclusion #14**

Specifically, social media are being used by legislators to better understand the environment into which a particular policy position might be staked; digital tools frequently are used to measure public support on issues, uncover new perspectives, gauge implications for supporting specific legislation, and research opposition

► **Conclusion #15**

If the first hope of any policy advocate is to breach the consciousness of Congressional offices with a particular point of view, social media present strong vehicles not only for reaching many legislators, but also for doing so during key moments of position development and decision-making

Policymakers Acting on Intel from Social Media

Representative Descriptions of Social Media Usage

Congressional Chiefs of Staff

New Voice in Decision-Making

“Does social media conversation impact our position? ...We’ve definitely rethought a vote or taken a different angle on a bill based on what’s happening in social. Absolutely at the provision level...We’ve changed positions more than once based on what we’ve learned in social media channels.”

Indicator of Knowledge Deficit

“We listen primarily to what interest groups and leadership are saying in social spaces. Sometimes, it just helps us to form narrative around our viewpoint. But sometimes someone introduces new intel that forces us to go back and research our position, talk to new people...and this has led us to change positions in the past.”

Signal for Stepping Up or Standing Down

“On some issues, social media provides the best possible read on whether a position we’d like to take will be popular and that certainly affects whether we push for it, how hard we push, and when. It’s an essential tool for reading the environment before pursuing action.”

Argument #2: Ample Early Discovery

► Conclusion #16

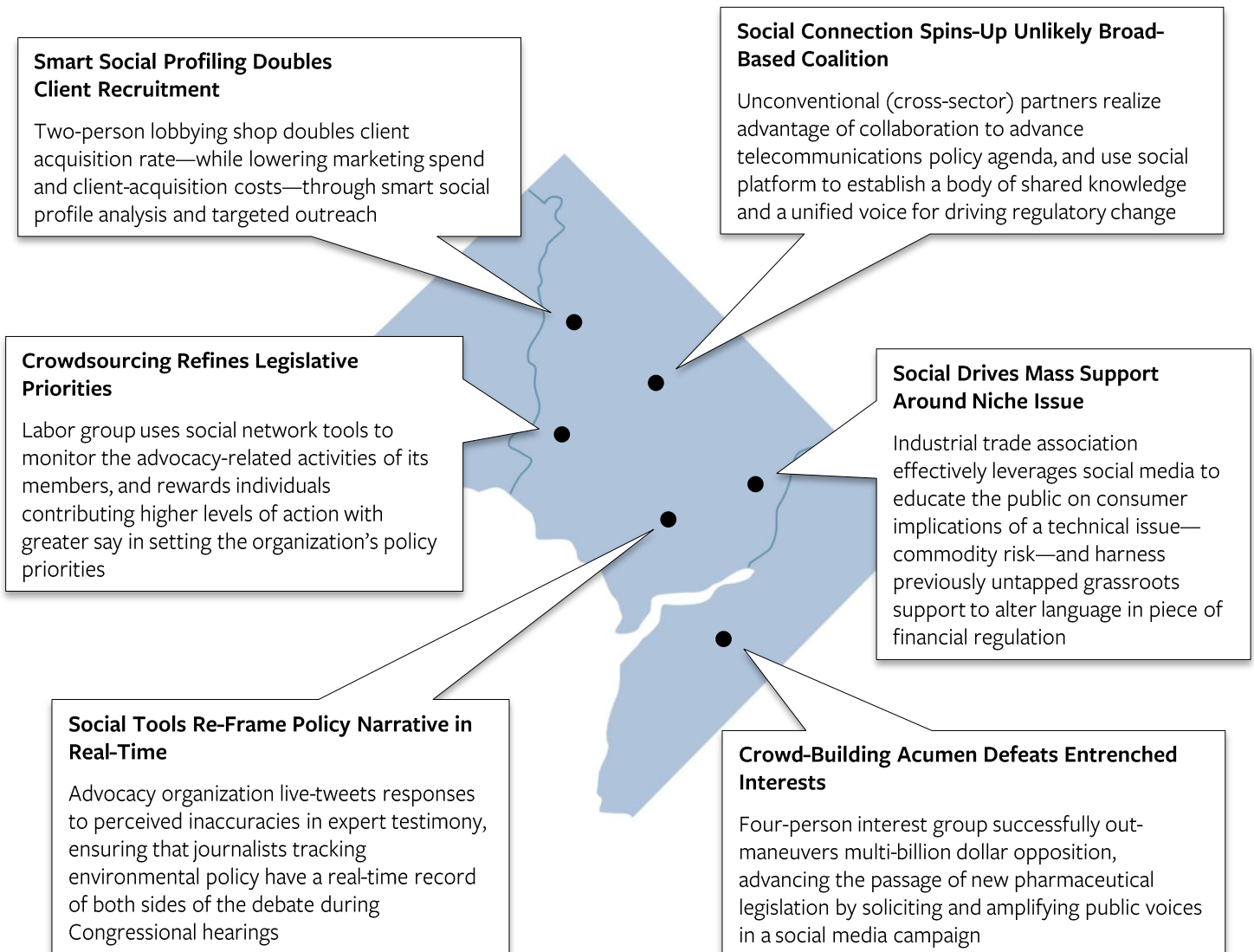
Second Argument: Washington advocates are already clamoring to claim the “white space” represented by social media in their niche areas, and are enjoying first-mover advantage over policy adversaries in digital debates; organizations that are not yet engaging communities and legislators on social media are falling behind

► Conclusion #17

Good News: There is no need for late-comers to reinvent the wheel; early experimentation with social media has generated a wealth of understanding about where social media can be used to advantage in a policy context

Beyond Experimentation at Some Organizations

Advanced Social Media Exploits inside Beltway



▶ **Conclusion #18**

First users have discovered an impressive variety of social media-enabled tactics to support their advocacy aims; documented uses supporting the Government Affairs function (mapped on following two pages) run a wide gamut—from informing the alteration of language in a bill to maximizing client acquisition and retention through smarter match-making

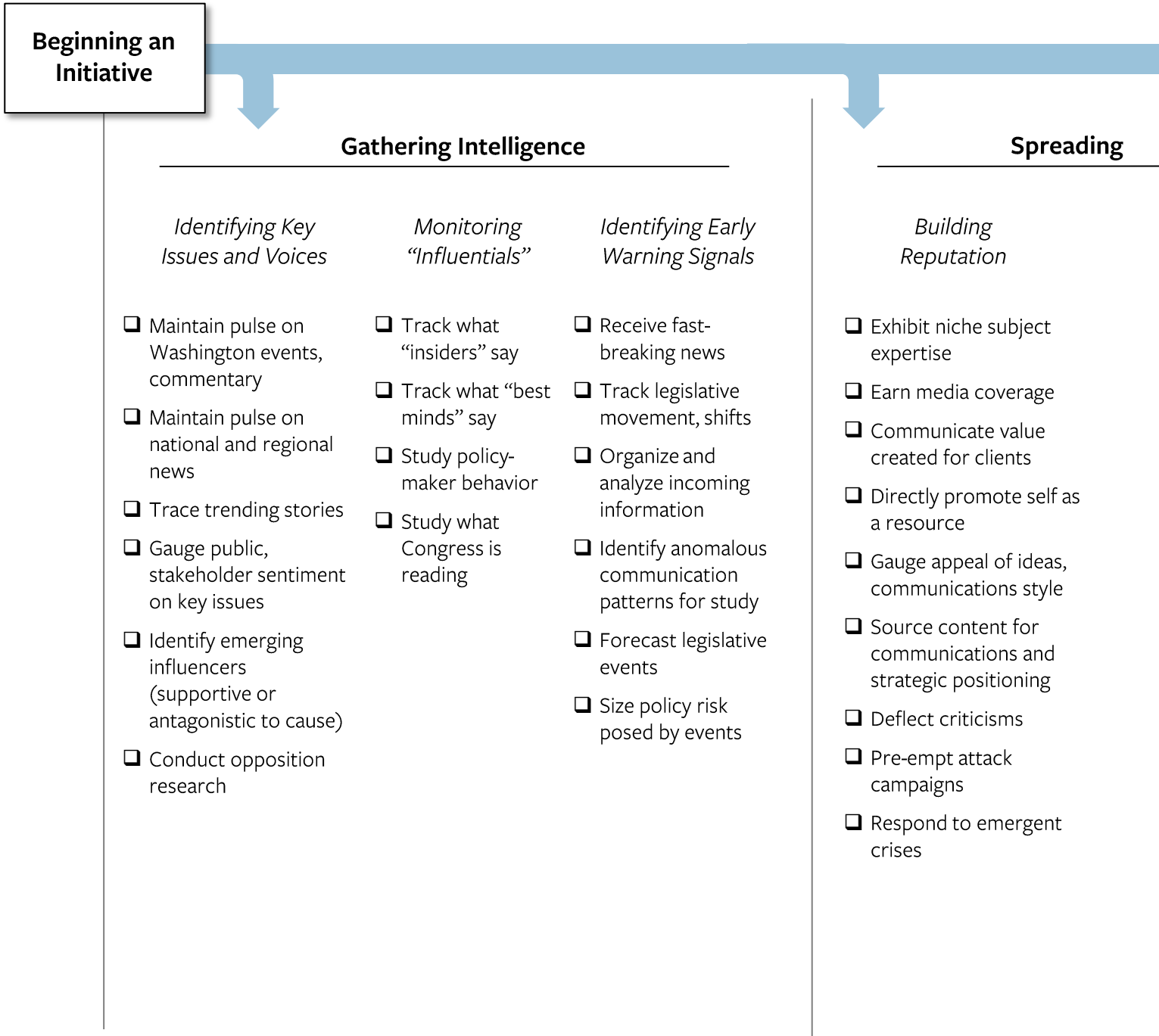
▶ **Conclusion #19**

Many of the tactics uncovered in our research bear only modest tweaks to current Government Affairs practice; a significant number of innovative practices do not create new work, but rather streamline existing work—making it more robust, faster, and more cost-effective

▶ **Conclusion #20**

For Consideration by All: Contrary to popular belief, social media's relevance favors no single advocacy role or organization type; client services firms, corporate government affairs shops, associations, nonprofits all share opportunity to improve organizational reach and effectiveness by adopting new digital tools

A Tool with Many Pastures of Relevance for



Applications

Public Policy Professionals

**Real-World
Influence**

Your Message

Building Relationships

- Identify emerging client and stakeholder priorities
- Expand lists of issue/position sympathizers
- Make new connections (clients, donors, advocates, etc)
- Facilitate stakeholder-stakeholder relationship-building
- Build and manage coalitions
- Micro-target communications
- Exchange support, validation to deepen existing relationships
- Manage client service, satisfaction
- Keep contacts “warm”

Inflecting Debate

- Broadcast positions to the public
- Brief stakeholders and constituents
- Insert the organization into ongoing dialogue, debate
- Build new dialogue, debate
- Highlight facts, stories, figures to frame a narrative
- Respond to opposition, misinformation
- Nudge conversations in different direction
- Defuse negative conversations before they “crest”
- Respond to/shape opinions of latent listeners

Driving Action

Triggering Online Advocacy

- Broadcast calls to action
- Inform, mobilize supporters quickly
- Promote cause(s) across groups
- Facilitate “virtual” lobbying, petitioning
- Reinforce community support (conferring social capital)
- Stimulate community sharing, peer recruitment

Triggering Traditional Campaigns

- Size public support / opposition
- Highlight overlooked issues
- Create compelling arguments with constituent-derived content
- Recruit stakeholders to offline events, advocacy actions
- Arm representatives for discourse, direct negotiations
- Inform traditional media strategy

Argument #3: A Steep (Re-)Learning Curve







► Conclusion #21

Third Argument: Study and practice are required to achieve social media proficiency; organizations that fall behind have little chance of “catching up in a hurry,” and will find themselves disadvantaged when forced to confront priorities that emerge unexpectedly from social spaces

► Conclusion #22

Case for Intensive Rehearsal: Often, the rules of digital advocacy actually run *counter* to the tactics and habits that have become second-nature to policy professionals; unlearning some of the “muscle memory” from a policy career requires patience, but is necessary to avoid social media engagement that unintentionally works against chosen advocacy goals

Learning Right Assumptions Takes Practice

	Offline Instincts		Online Reality
Credentials	Establishing organizational affiliation and offline status is key to acceptance online.		Flaunting offline credentials will turn off online communities. Reveal biases before they are “discovered.”
Dialogue Partners	Associating yourself online with partners possessing the best offline brands to enhance online status.		Associating with those who move the conversation forward through terrain expertise, debate skill, strong etiquette.
Frequency of Messaging	Publishing frequency is the key to remaining relevant and sustaining audience attention.		Moving existing conversations forward by contributing subject-matter expertise of higher value. Don't contribute to remain top-of-mind.
Content Vetting	Vetting communications internally lowers the potential for misunderstanding or willful misinterpretation.		Online communities abhor talking points. Equip spokespeople with rules of engagement, not rhetoric.
Response to Negativity	Purging negative comments quickly reduces risk of snowballing dissent.		Purging invites its own criticism. The community will defend you against unfair attacks. Praise positive views.
Getting to “Virality”	Getting messages into the hands of connectors with large online networks encourages virality.		Spreading content through small, high-trust networks drives total discussion volume. Package emotionally compelling content for easy digestion.

► Conclusion #23

A series of unique laws governs social media interactions, just as a series of laws governs shoe-leather lobbying; the catalogue below summarizes learning from the research about how information and influence flow across social spaces, and can be used as a reference tool by Members now contemplating first steps

► Conclusion #24

While perhaps only several of the listed laws are intuitive, all require serious consideration; observing these laws in social media communications will insulate the organization from a great many unintended effects of offbeat social media behavior

Rules of Behavior are Different Online

Ten “Laws” Govern the Physics of Interaction in Social Spaces

Laws Governing Dialogue

Law of Community Contribution—Communities confer authority to individuals based on knowledge, debate quality, adherence to rule of etiquette

Law of Transparent Motivation—Communities abhor hidden motivations and biases and confer most social capital on participants driven by passion for issues

Law of Anonymous Critique—Anonymity of participants promotes frank dialogue and feedback, removing content distortions created by face-to-face dialogue

Law of Cocktail Etiquette—The community defends individuals against personal attacks whose tone detracts from the dialogue rather than advancing it

Law of Crowd Arbitration—The community collectively judges the quality of dialogue online and pressures conversational detractors to leave or be silent

Law of Collective Narrative—The crowd controls the direction of dialogue online and resists efforts by individuals to steer it

Laws Governing Sharing

Law of Short Distances—Social networks rely on small groups of individuals who trust one another to share relevant content and filter out noise

Law of Quick Bursts—Social networks can sustain the will of participants to act for relatively short periods and for relatively simple tasks

Law of Conservation of (Personal) Energy—Individuals share content that requires low personal effort and is packaged for easy appeal (e.g., short, emotionally rich)

Law of ‘Selfish’ Sharing—Individuals share content that reflects well on them, strengthens their desired identity and connects them to areas of mutual interest

Note to Members

Highly interactive social networks are defined by small groups of like-minded individuals, dialogue that reinforces self-image and self-interest, and particular laws of conduct.

For each best practice profiled in this study, we will highlight the laws is in operation.

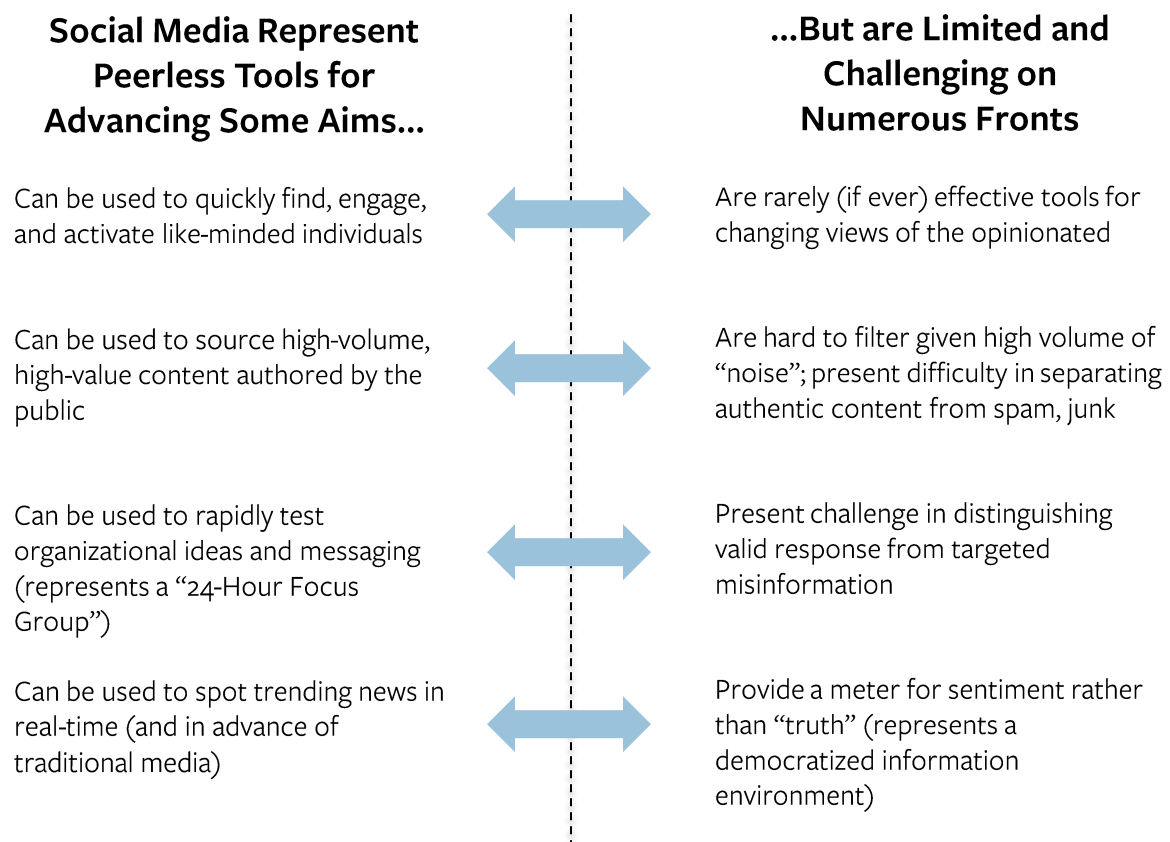
► **Conclusion #25**

Bearing Mention: While social media indeed present a number of unique strengths as advocacy tools, they also carry a number of distinct limitations; social media are highly valuable resources for tracking and clarifying sentiment, for example, but are rarely valuable as means for ferreting out truth or changing the views of the opinionated

► **Conclusion #26**

Adoption of social media for advocacy purposes should therefore be sensitive to the operating characteristics of the social web, and organizations should avoid relying too heavily on social media to achieve aims for which digital tools tend to be ill-suited

Distinctive Advantages and Shortfalls of Social



▶ **Conclusion #27**

Policy professionals should plan for an extended adjustment period and embrace a culture of experimentation in the course of early social media learning; regular, low-risk ventures into online discussions are advised to build confidence and validate tactics before making larger-scale investments

▶ **Conclusion #28**

Several Areas of Common Challenge: Making sense of online interactions, propelling dialog, and securing meaningful action from stakeholders consistently pose difficulty to new users

▶ **Conclusion #29**

National Journal Membership's research team identified nine best practices—showcased across the remainder of this study—to aid in navigating these challenges; accordingly, practices address surfacing risks and opportunities through social media listening, strengthening reputation through strategic online engagement, and leveraging supporters to maximize influence

▶ **Conclusion #30**


A Note on Case Studies: Profiled examples reflect varying intensity and sophistication of social media use—from passive listening to active harnessing of constituent voice; though not all practices will match the ambition and resources of every Member organization, all organizations should find numerous concepts of value

No Shortage of Challenges

#1


How Do I Make Sense of Online Interactions?

Language and Etiquette Barriers



Online communities create their own vocabulary

High Ratio of Noise to Substance



Difficult to filter useful information and from mass of content

Uncertain Loci of Real Influence




Once content becomes shared, it is difficult to find the original user behind the idea

#2


How Can We Propel High-Impact Content?

Little Trust in Institutional Voices



Audience is skeptical of messages coming from organizations as opposed to individuals

No Purchase in Issue Debates



Few in organization have the expertise to be credible voices in debates in niche discussions

Limited Message Engagement



Interaction on social media mostly one-way, little response to posts

Inactivity of Key Internal Allies



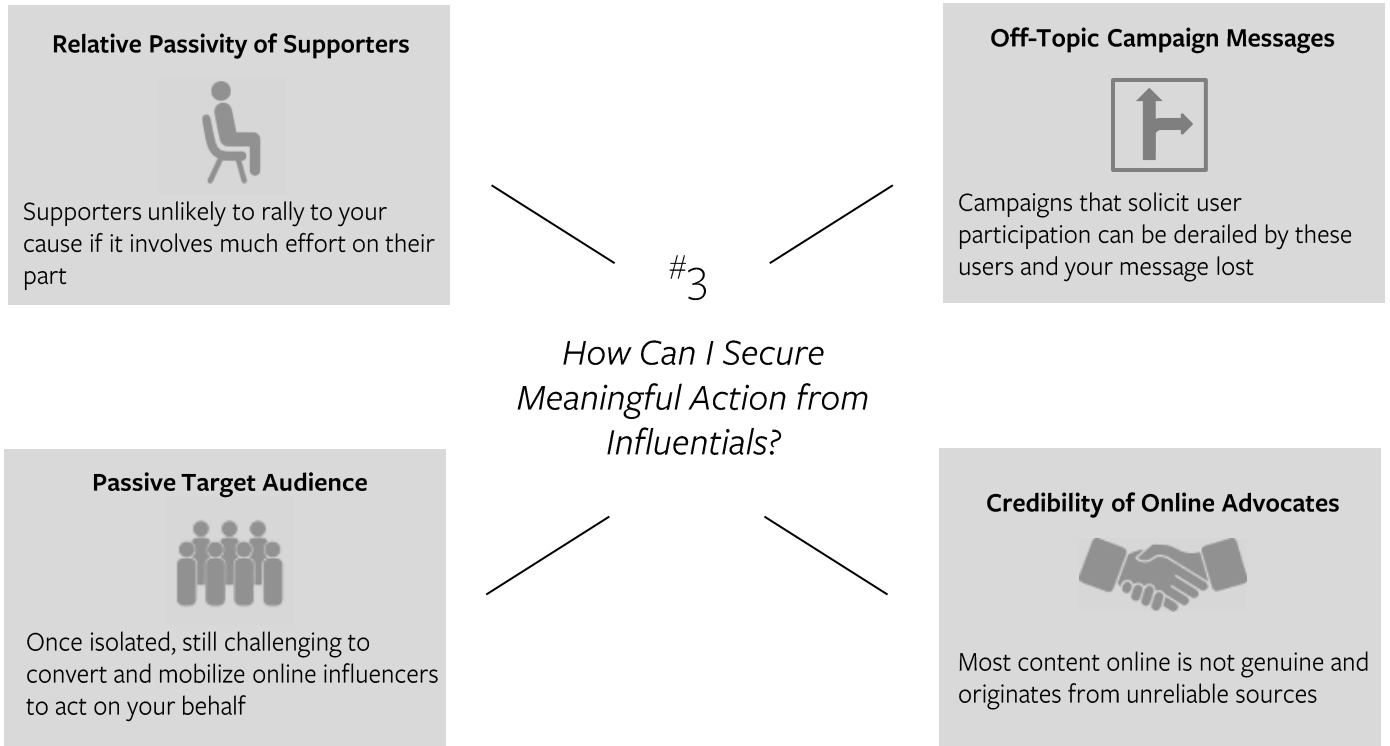
Allies may lack presence on social media, or be slow to defend your brand once attacked

Hefty Exposure to Brand Attacks



Social media platforms provide users to spread messages of discontent at lightning speed

to Overcome



Information Overload

“We find that on social media platforms, there is simply too much content to sift through. It’s hard to find the diamonds in the rough. We lack a systematic way to identify the movers and shakers of these online communities, and even if we could find them, we wouldn’t know how to rally them to our cause.”

*Vice President, Communications
Trade Association*



Is Anyone Listening?

“Though we broadcast our message through many social media platforms, our posts generate no comments or discussion. No one is listening, so we wonder if we’re squandering resources on a worthless venue.”

*Vice President, Communications
Fortune 500 Company*

The New Tools

Lessons for the Policy Community from

	Surfacing Risks and Opportunities Through Social Media		Strengthening
	I. Tracking Emerging Issues	II. Identifying Online Influencers	III. Positioning Opinion to Get Noticed
Key Themes	<ul style="list-style-type: none"> • Mastering “beyond-the Beltway” language • Gathering insight from online behavior of stakeholders • Identifying “early warning” signals through social media monitoring 	<ul style="list-style-type: none"> • Understanding the structure of online networks and power of “least resistance” connections • Discovering markers of online social status • Identifying players with disproportionate authority 	<ul style="list-style-type: none"> • Building crowd affinity and engagement by using “right” voice • Creating content optimized for sharing and resonance in social spaces • Maximizing exposure by right-timing entry into conversational “waves”
Profiled Practice	<p>#1 The Beginner’s Toolkit: Smart Dashboard Construction</p> <ul style="list-style-type: none"> • Key issue trends • Stakeholder sentiment analysis • Heuristics for predicting policy shifts 	<p>#2 Influencer Ecosystem Mapping</p> 	<p>#3 Specialized Spokesperson Roles</p>  <p>#4 Newsjacking</p>

of Advocacy

the First Wave of Social Media Adoption

Reputation Through Strategic Online Engagement

IV. Defending Against Social Media Attacks

- Holding fire when criticized online
- Assessing the ability, inclination of the community to rise to your defense
- Disarming antagonists through measured response

#5 Criticism-Response Flowchart



V. Empowering Staff Members for Impact Advocacy

- Avoiding the “chilling effects” of a (necessary) social media policy
- Developing decision principles that embolden the workforce to speak
- Promoting a bank of sharable content

#6 Stoplight Communications Protocol



Leveraging Supporters to Maximize Influence

VI. Extending the Online and Offline Value of External Partners

- Activating supporters according to capacities, energy levels
- Leveraging on- and off-line interaction “loops” to build promising new relationships
- Leveraging content emotionality, narrative to maximize on- and off-line action

#7 Tiered Engagement Menu



#8 Story-Centered Grasstops Recruitment



#9 Aided Trending



II

LESSONS FOR THE POLICY COMMUNITY FROM THE FIRST WAVE OF SOCIAL MEDIA ADOPTION

Best Practices

Chapter 1: Surfacing Risks and Opportunities through Social Media	26
Chapter 2: Strengthening Reputation through Strategic Online Engagement	54
Chapter 3: Leveraging Supporters to Maximize Influence	96

A Word on Social Media Investments

A number of the best practices profiled in this publication will appear very expensive to implement—sometimes because of the size of the organization represented in the case study, but more often because of the sophistication of the detailed approach. That said, nearly all social media tactics shared here can be replicated (in function if not form) at reasonably low cost.

It is worth noting, however, that involvement in social media is never *entirely* free. Even advocacy professionals who do not use external consultants and media-monitoring technologies, for example, will find that a measure of time and resources must be dedicated to the cause—especially in early stages. Incremental costs should be carefully considered (and budgeted) when building-up social media capabilities, and investments should be targeted smartly.

Also bearing mention: Investments of staff energy must include the energies of senior Government Affairs officers. A high degree of partnership across functions is required to successfully port the insights gained from a career of policy advocacy—a critical ingredient for organizational advantage—into broader digital discussions. Whether such cooperation is achieved through shared incentives, modified job descriptions, or collaborative projects will depend on the organization and the extent to which traditional organizational silos challenge an inclusive approach.

Chapter One: Surfacing Risks and Opportunities through Social Media

This chapter explores approaches to tracking issues worthy of enterprise attention, identifying previously unknown influencers in digital spaces, and understanding the shape and structure of influence networks across social media

Tracking Emerging Issues – Key Findings

▶ **Conclusion #31**

The greatest challenges to gathering intelligence online are knowing where to look and having the patience to sort through the welter of conversation; the signal-to-noise ratio online is incredibly low, even in comparison to traditional media

▶ **Conclusion #32**

To identify important emerging issues and positions at the source, a much more sophisticated understanding of the online environment—common social media roles, “real world” language, the structure of online networks, the location of important “watering holes,” and the nature of sharing in social spaces—is necessary

▶ **Conclusion #33**

An ideal starting place for intelligence gathering is observing the online habits of important stakeholder groups— allies, opponents, subject-matter experts, policymakers, and the like; social media offer an unprecedented opportunity to understand whose opinions each of these constituencies seeks, and to track how and when the positions of stakeholders develop

Practice #1: The Beginner’s Toolkit—Smart Dashboard Construction

Organization deploys simple social media monitoring tools to organize and analyze activity of relevance to organizational decision-making; tools enable real-time and across-time issue and stakeholder tracking, and become more sophisticated as experience and organizational needs grow

Identifying Online Influencers – Key Findings

▶ Conclusion #34

While subject-matter experts and issue-passionates fill social media with new ideas and rich narrative, an important new role—“issue-maker”—is disproportionately responsible for the ideas that gain real traction

▶ Conclusion #35

Issue-makers possess a rare combination of traits: on the one hand, they are deep enough in issues to engage credibly with experts and passionates; on the other, they have a knack for interpreting, framing, and packaging ideas in a way that resonates with policymakers or their advisors (who are increasingly listening online)

▶ Conclusion #36

For professional policy advocates, identifying the top issue-makers in their policy space is an essential exercise for tapping the value of social media; while the community collectively controls the direction of conversation, its trust in issue-makers gives these individuals unmatched influence in shaping the dialogue

▶ Conclusion #37

Despite their influence, finding these “issue-makers” online is easier said than done; the traditional markers of influence—credentials, proximity to power, resources—do not apply in the social media context

▶ Conclusion #38

The best way to identify these influentials is to look not at the volume of content they generate, but at the frequency with which others choose to share it; the choice to share indicates that the author’s content is perceived to advance the conversation and that it is packaged in such a way as to reflect well on the sender

▶ Conclusion #39

Advocacy shops are identifying the top issue-makers in their policy spaces with the twin purposes of listening to them and, ideally, informing their interpretation and framing of issues; this latter ambition can be tricky, however, as perception of coziness with professional advocates can erode the influence that is unique to issue-makers

Practice #2: Influencer Ecosystem Mapping

Organization identifies and charts relationships among the top online influencers for each top policy priority; resulting map of influencer networks permits more efficient targeting of messages and relationship-building efforts

Practice#1: The Beginner's Toolkit—Smart Dashboard Construction

■ Practice Description

Organization deploys simple social media monitoring tools to organize and analyze activity of relevance to organizational decision-making; tools enable real-time and across-time issue and stakeholder tracking, and become more sophisticated as experience and organizational needs grow

■ Situation

Organizations that are beginning to monitor and mine social media for intelligence often find it difficult to determine which conversations to track, and harder yet to know what legitimate insight might be gleaned from the online chatter.

■ Action

Organization starts by identifying common (largely outside-the-Beltway) language used to describe key policy issues of interest, as well as important stakeholders who are active online. The organization then analyzes the volume and tone of online stakeholder commentary involving relevant keywords. By capturing this data in a dashboard and tracking trends over time, an illustration of important social dialogue is made available to executives to support decision-making. As users become increasingly familiar with the rhythms and behaviors of tracked communities, they are able to spot deviations from normal conversation patterns that highlight moments of potential sentiment and policy shifts.

■ Result

Smart dashboarding allows the organization to more effectively track the social conversation, and ultimately to strengthen intelligence for risk management and action-taking on emergent policy opportunities.

■ Laws of Social Media in Action

- | | |
|--|--|
| <input type="checkbox"/> Community Contribution | <input checked="" type="checkbox"/> Collective Narrative |
| <input type="checkbox"/> Transparent Motivation | <input checked="" type="checkbox"/> Short Distances |
| <input checked="" type="checkbox"/> Anonymous Critique | <input type="checkbox"/> Quick Bursts |
| <input type="checkbox"/> Cocktail Etiquette | <input type="checkbox"/> Conservation of (Personal) Energy |
| <input type="checkbox"/> Crowd Arbitration | <input checked="" type="checkbox"/> 'Selfish' Sharing |

► **Conclusion #40**

Creating an effective dashboard for monitoring significant social media conversations requires executing several critical preparatory steps

► **Conclusion #41**

Step 1: Translate technical Washington terminology used to describe the organization’s policy interests into the public’s vernacular; keywords and phrases commonly used *outside* the Beltway can be used to root-out new, relevant conversations and voices across social media

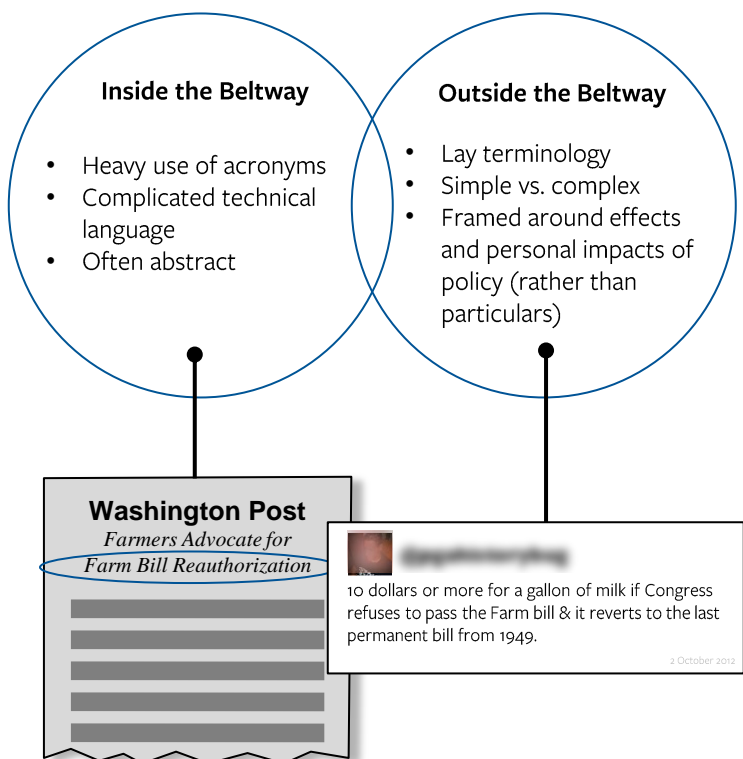
► **Conclusion #42**

Start Simple: Free tools available online—for example, Google AdWords—can help to isolate the language most frequently used to describe policy issues in digital communities; documenting keyword results in a working thesaurus, of types, is advised to streamline later searches

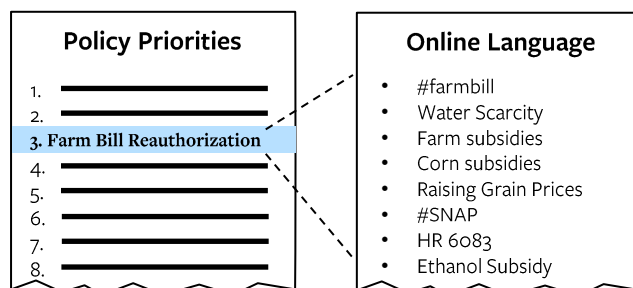
Different Vocabularies in Social Spaces

Inside-the-Beltway Jargon Conceals Rich Dialogue

A (Sometimes) Divergent Vernacular



Translation Required for Capturing All Relevant Voices



Implementation Tips—Surfacing Key Terminology

- ☑ Use tools (such as Google AdWords, keyword search results, Tweetdeck/Hootsuite applications, and word spider graphs) to aid in first-level translations
- ☑ Listen to online conversations and adopt observed new terms as you seek new conversations
- ☑ Avoid broad terms that have multiple definitions – they can lead you astray
- ☑ Log common keywords and phrases associated with each of the organization’s issues and sub-issues

► **Conclusion #43**

Step 2: Select a set of influential individuals—ideally representing a balanced perspective on the organization’s key issues—to follow; continuously monitoring these individuals for their use of terminology uncovered in Step 1 will shed light on new opinions and positions as they are communicated across social media

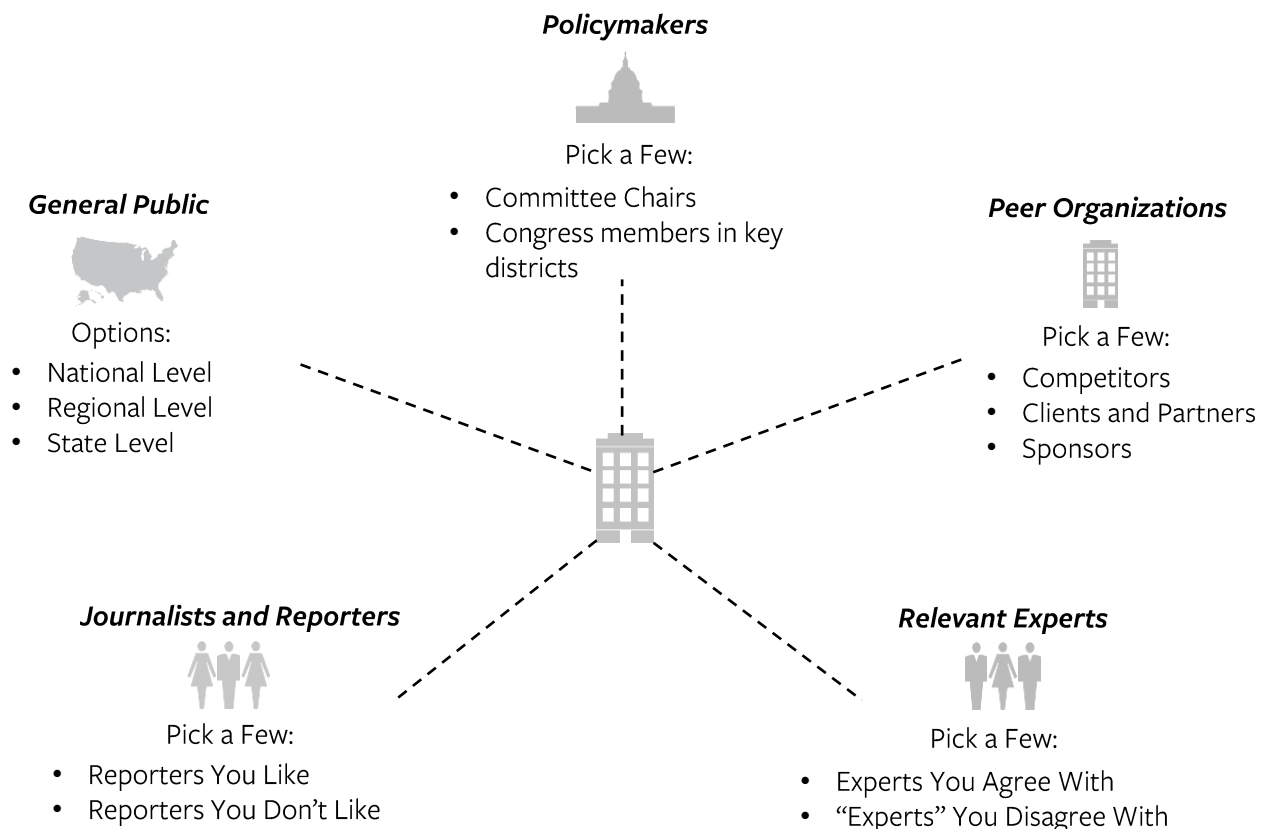
► **Conclusion #44**

National Journal Membership suggests choosing individuals already familiar to the organization as a starting point; overthinking this step carries the risk of “analysis paralysis,” and Members should recognize that the list will be refined over time

Key Stakeholders to Monitor

Selecting a Necessary Few to Get Started

Whom to Track in First Social Media Forays



► **Conclusion #45**

Step 3: Create a mechanism for tracking comments on relevant topics (Step 1) by relevant individuals (Step 2) using inexpensive—or free—social media “listening” tools (e.g., Tweetdeck or Hootsuite); without a formalized tracking mechanism, many find that their ability to organize the high volume of digital conversation is quickly overwhelmed by volume of chatter

► **Conclusion #46**

Beginners should follow fewer than seven issues at a time to focus their attention, avoid information overload; commitment to regular purging of keywords and connections that prove low-yield—and adding new ones in their place—is critical to keeping current within rapidly evolving social conversations

Developing a Real-Time Monitoring Tool

Gaining a Glimpse of the “Underground” Conversation

Basic Tracking Tool Design



Implementation Tips—Organizing the Tool

- ☑ Organize important activity from left to right
- ☑ Limit the number of streams that you create and follow
- ☑ Curate content by removing any outdated or unimportant feeds of information

Implementation Tips—Analyzing the Data

- ☑ Consider using a vendor for deeper analytics; manual analysis of data on most free social media platforms is possible, but time-consuming; consider whether to use a vendor for deeper analytics
- ☑ Focus on greatest analytic needs in evaluating external service providers; hundreds of free and premium service providers can assist with measuring participant “influence”, assessing content sentiment, measuring overall conversation volume and participant engagement trends, mapping relationships/connections, and so forth

► **Conclusion #47**

Step 4: Create and apply rules for counting volume and categorizing sentiment (e.g., choice of words, overt support or opposition, etc) of tracked conversations, and fashion a dashboard template that summarizes these statistics by stakeholder type and observation timeframe

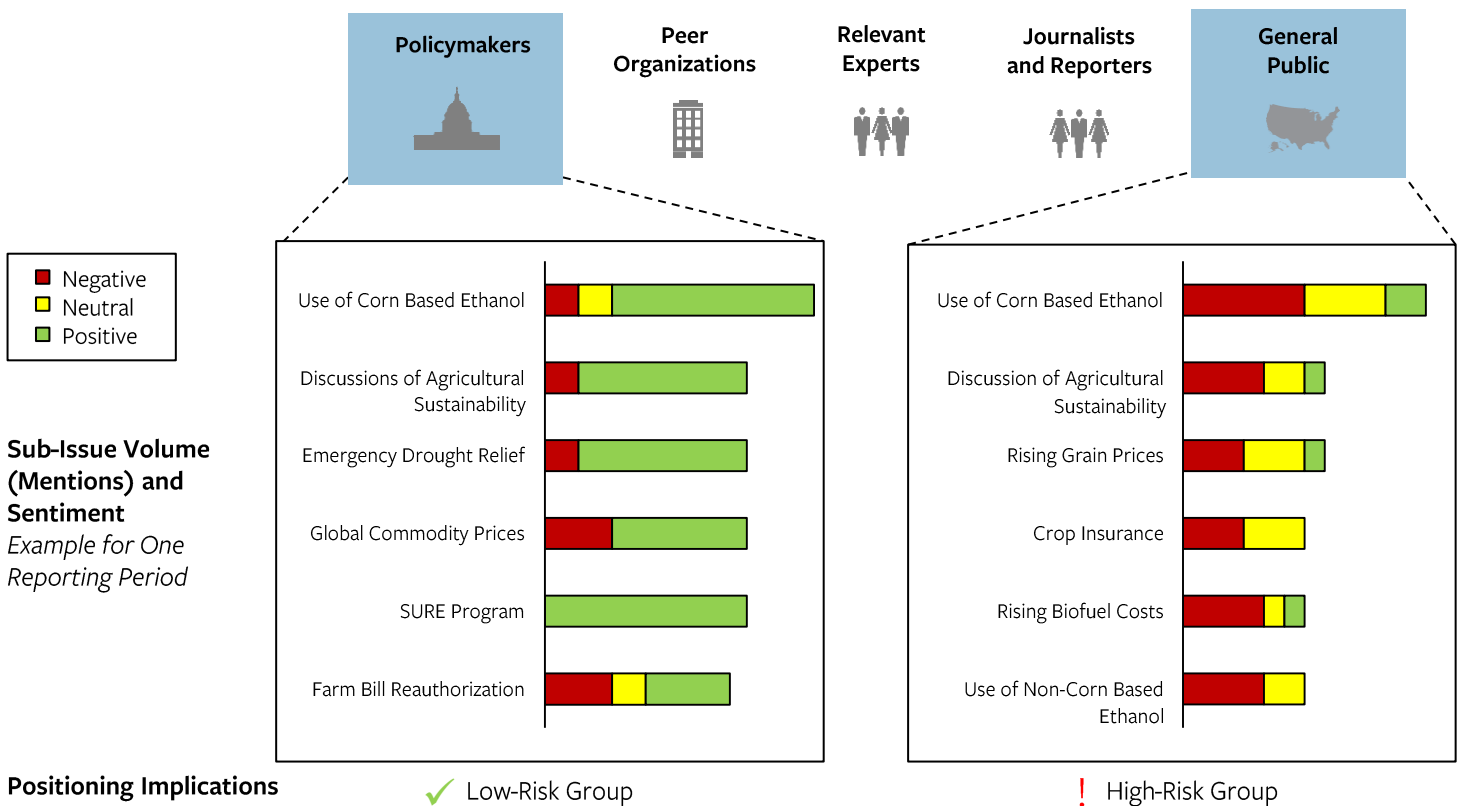
► **Conclusion #48**

Whether generated manually or with the aid of a vendor’s solution, effective summaries highlight moments when conversations seem to be accelerating, favorability of various issues and sub-issues among stakeholder groups, and the words, phrases, and themes that will be critical to future organizational message-shaping

Building an Executive Dashboard

Initial Application: Volume and Sentiment Tracking

Example from One Firm



Implementation Tips—Applications of the Exercise

- ☑ Identify importance of a topic to stakeholder group
- ☑ Identify stakeholder group’s disposition toward a topic
- ☑ Compare differences between stakeholder groups for strategy planning
- ☑ Identify simultaneously spiking issues and/or sub-issues to “connect the dots” in message development
- ☑ Track changes to the above over time

► **Conclusion #49**

Not Starting with Perfect: Most of the learning—around 80%—comes from simply setting up a monitoring process in the first place; fine-tuning should occur over time, as judgment grows stronger

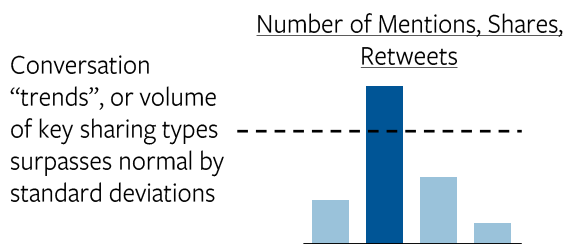
► **Conclusion #50**

Although they provide improved awareness of policy-related dialogue online, volume and sentiment metrics do have predictive limitations; most notably, these metrics are rarely accurate in forecasting how conversations and stakeholder interests will evolve in the future

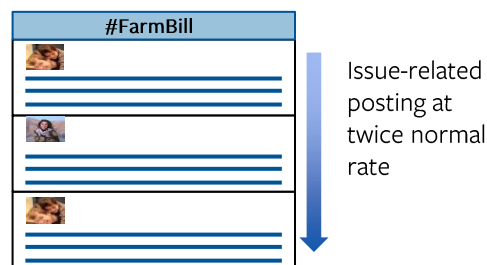
In Search of Early Warning Signals *Distinguishing Between Substance and Noise*

Data can tell us a lot about what's happening now...

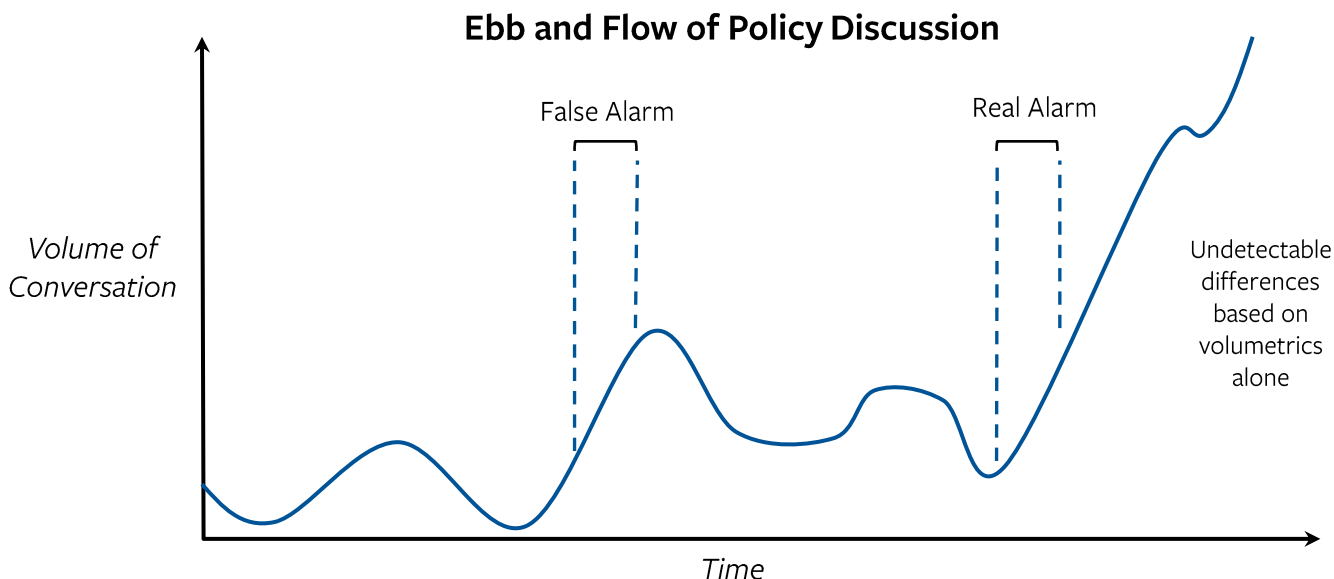
Meaningful Spike in Engagement Metrics



Increased “Clock Speed” in Media Tracking Tool



...but frustrates attempts to predict what happens next



► **Conclusion #51**

Key to spotting emerging trends in social media activity instead lies in recognizing deviations from an individual’s or organization’s normal (online or offline) behaviors

► **Conclusion #52**

Seasoned advocacy practitioners are well positioned to spot the unconventional in real time—a result of their knowledge of typical vs. atypical behaviors in communities of interest; for this reason, senior Government Affairs officials should never fully abdicate or assign-out social media monitoring responsibilities to non-GA staff

Heuristics that Only Experience Can Inform *Watching for Deviations from Hardened Behaviors*

Events and Patterns Trigger Further Investigation, Positioning

For the Novice User

- Emergence of new angle/perspective from a known expert or influencer related to an issue which has largely calcified
- Unexpectedly declared position from a key decision-maker (policymaker, staff) on a high-profile issue

For the Intermediate User

- Unusual comment about an event or previously unknown trend from multiple (at least two) trusted sources
- Flood of new participants—especially those with unique profiles and preferences as compared to normal conversation participants—into an established social media debate
- Change of heart, openness to alternative view expressed by key voice in debate

For the Advanced User

- Unusual shift/spike in conversation participants’ use of opposition language, talking points
- Interest in a new issue area (noted by article sharing, questions) signaled by a key influencer
- Observed interaction between unnatural or atypical online communities, personalities
- Convergence of opinion or agreement between traditional debate opponents
- Mainstream media validation of opinion expressed by fringe group, individual

Reasoning
it Out

Leveraging
Experience-
Based
“Spidey Sense”



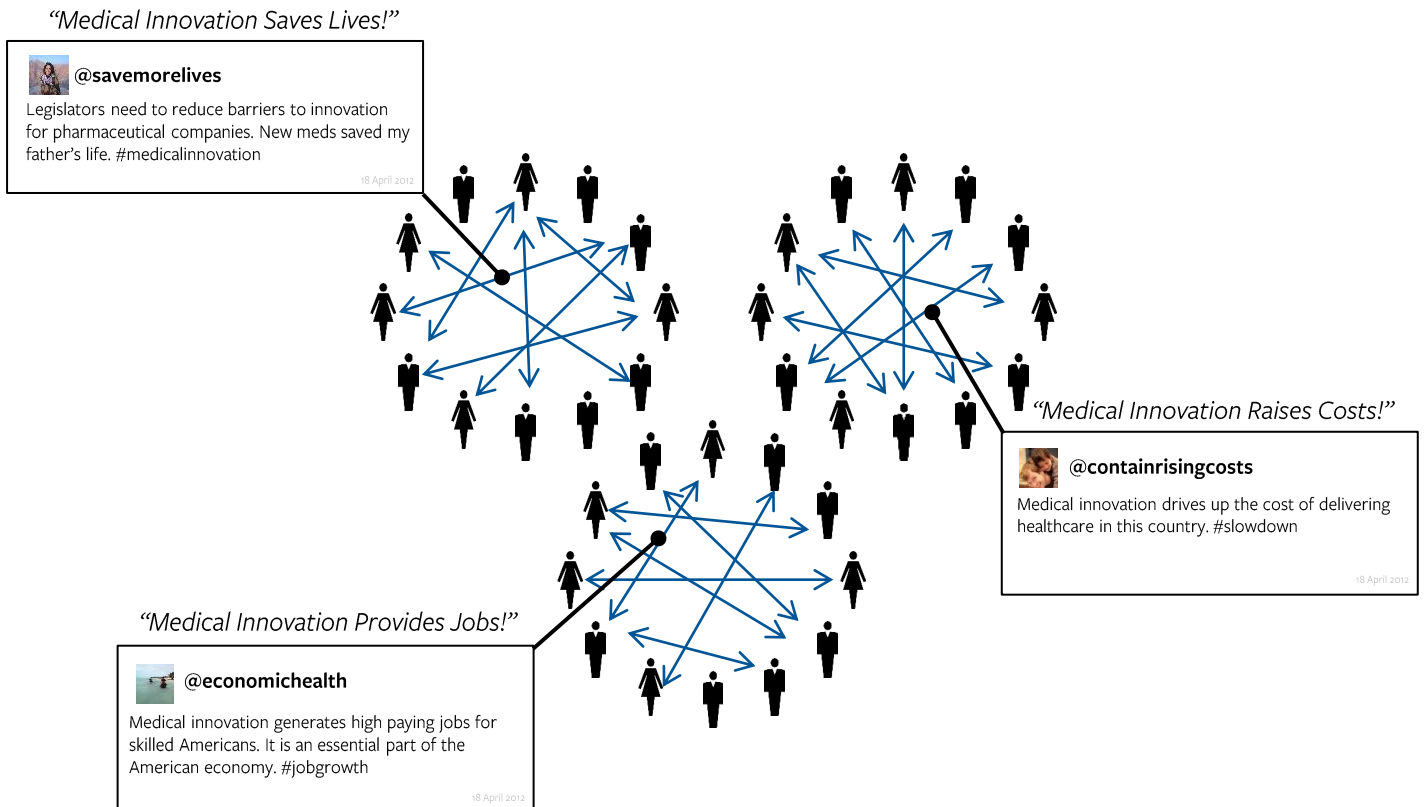
► **Conclusion #53**

Illustration: The vast majority of policy conversations taking place on social media are dominated by small, like-minded communities, and are largely predictable; policy professionals can quickly identify these groups, document their tendencies, and then detect pattern changes that could represent threats or opportunities

Tendency to “Cocoon” in Social Channels

Insular Chatter within Like-Minded Communities Dominates

Representative Sentiments of Different Social Media Sub-Communities



► **Conclusion #54**

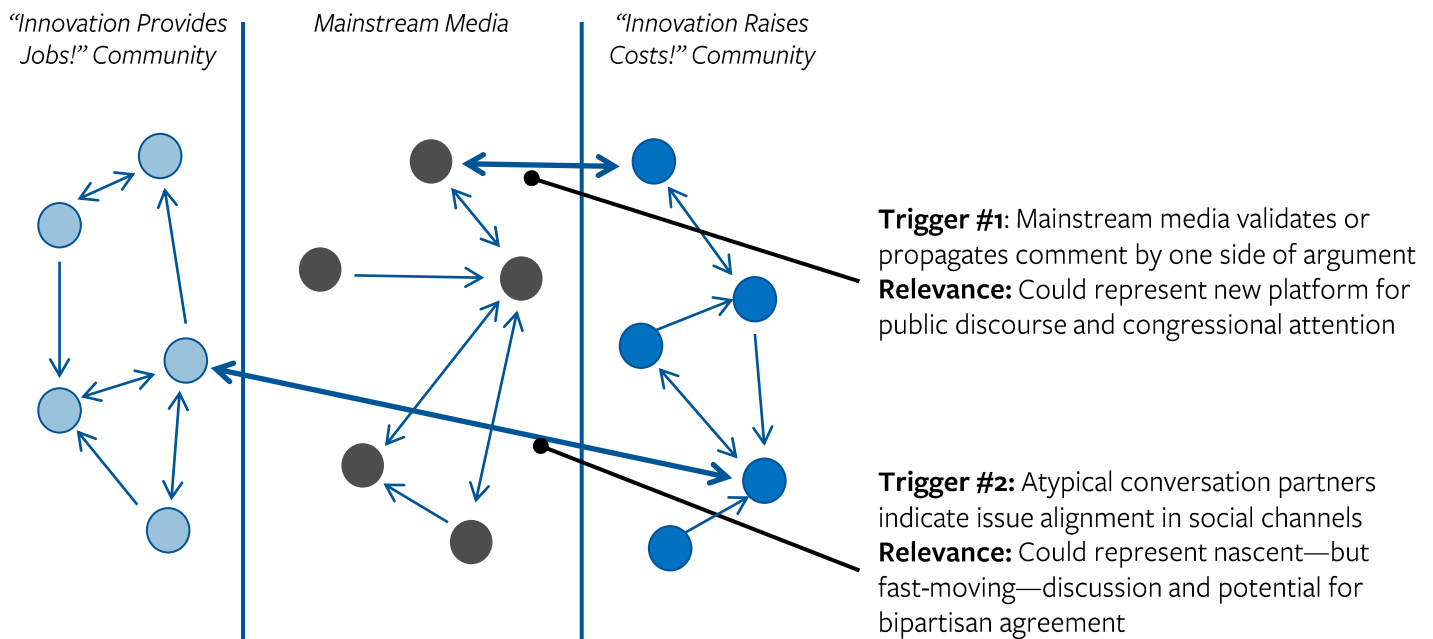
Effective social media strategists establish “action triggers”—threshold levels of irregular activity relating to issues of interest—that prompt further investigation or organizational response

► **Conclusion #55**

When response is warranted, organizations should consider offline as well as online options; though intelligence prompting a response may have emerged in social media, the most expedient or effective response could rely heavily on offline tactics

Atypical Conversations Trigger Interest

Monitoring Across Groups for “Break-Out” Conversation



Case in Brief



Profiled Organization: PhRMA
Organization Type: Trade Association

Headquarters: Washington, DC

- Developed series of alarms/triggers, based on irregular conversation patterns, that serve as first alerts of potential breaking issues
- Watches conversations, for example, that grow in popularity or appear to be going mainstream

Practice Assessment

The Beginner's Toolkit—Smart Dashboard Construction

Low \longrightarrow High

Time Commitment: ● ● ● ● ○

Implementation Difficulty: ● ● ○ ○ ○

Required Degree of GA Involvement: ● ● ● ● ●

Impact: ● ● ● ○ ○

Overall Grade: A

Highly applicable to any individual interested in maintaining real-time visibility into activity and sentiment related to specific policy issues. Requires ongoing maintenance—terminology updates, changes to lists of individuals being tracked in social media, and so forth—to sustain relevance of the tool.

Practice #2: Influencer Ecosystem Mapping

Practice Description

Organization identifies and charts relationships among the top online influencers for each top policy priority; resulting map of influencer networks permits more efficient targeting of messages and relationship-building efforts

Situation

While familiar with many of the voices speaking about relevant issues in social spaces, many organizations have a limited understanding of the relative influence each party exerts on others. Lacking this understanding, decisions about which new voices to track, where to focus relationship development resources, and where to plant messages often are made by “best guess.”

Action

Organization identifies all of the significant online voices for its policy priorities, and calculates the comparative influence of each voice by applying an algorithm that heavily weights specific engagement metrics. Identified “top influencers” can then be observed to uncover inbound and outbound sharing patterns, and visually mapped to illustrate the paths of influence across the social network.

Result

Influence-sizing and -mapping exercises surfaced powerful but previously unknown voices, and gave clarity to who interacts with whom. Mapping of interactions allowed for more efficient and effective direction of organizational messaging and relationship development activities—specifically, toward participants in conversations that are likeliest to influence others.

Laws of Social Media in Action

- | | |
|--|--|
| <input checked="" type="checkbox"/> Community Contribution | <input type="checkbox"/> Collective Narrative |
| <input checked="" type="checkbox"/> Transparent Motivation | <input checked="" type="checkbox"/> Short Distances |
| <input type="checkbox"/> Anonymous Critique | <input type="checkbox"/> Quick Bursts |
| <input type="checkbox"/> Cocktail Etiquette | <input type="checkbox"/> Conservation of (Personal) Energy |
| <input type="checkbox"/> Crowd Arbitration | <input checked="" type="checkbox"/> ‘Selfish’ Sharing |

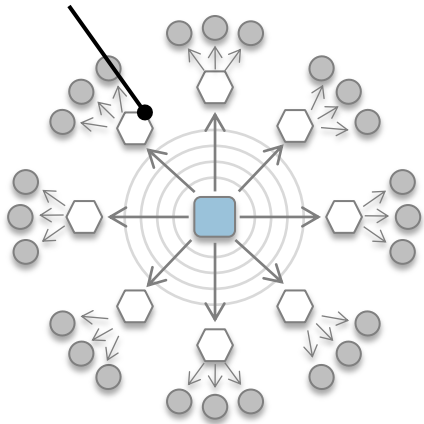
► **Conclusion #56**

Broad-based sharing of information and ideas in social spaces does not generally occur through a linear, one-way process; rather, it is a result of a series of highly personal exchanges among many small interest communities of common beliefs and experiences

Different Mechanics of Influence

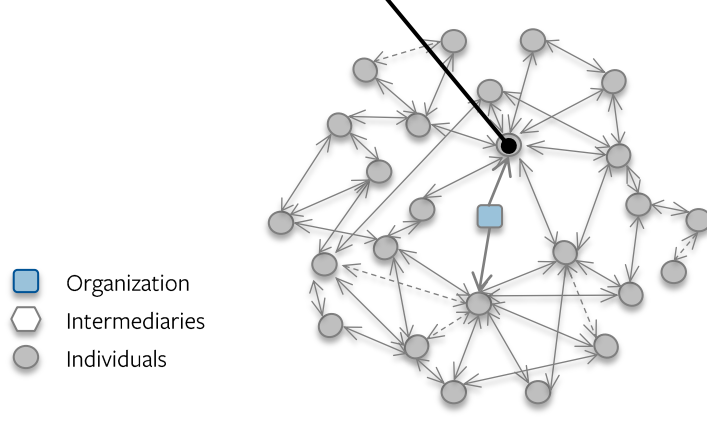
Traditional View of Influence

Information driven to known intermediaries, and thereafter to intermediaries' contacts



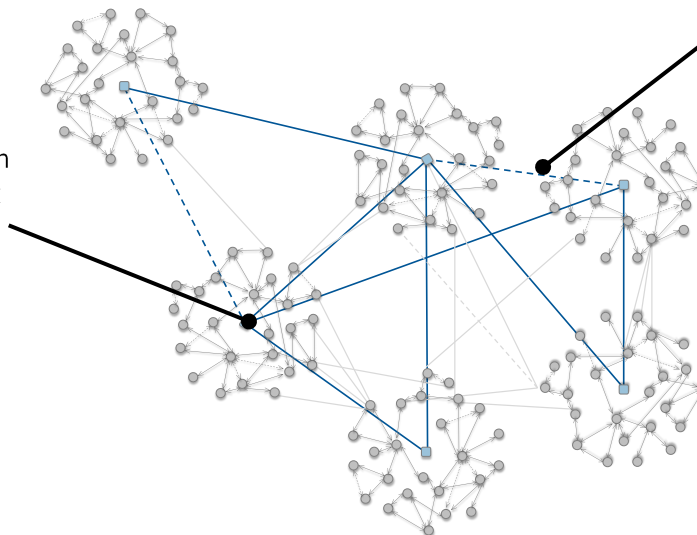
Network View of Influence

Information flows are non-linear; connections and roles are dynamic, bi-directional



Not a Network, but a Network of Networks

Message propagation depends on network structure—who is connected to, communicates with, and listens to whom



Group dynamics on social web preclude use of social media as a megaphone for broadcasting to all

Source: Duncan Watts and Peter Dodds, "Influentials, Networks and Public Opinion Formation," 2007; Paul Adams, *Grouped*, 2011; Paul Adams, "How Your Customers' Social Circles Influence What They Buy...," 2011; person images by the Noun Project; National Journal Membership Research interviews and analysis.

► **Conclusion #57**

One key implication of this “kinship” ecosystem is that policy organizations cannot rely on social media as a broadcast channel; focus is better placed on penetrating smaller groups in which participating individuals (especially those in the influential set) tend to trust and value opinions of other group members

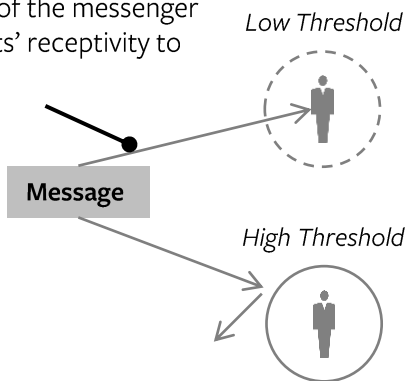
► **Conclusion #58**

For efficiency’s sake, the best “carriers” of messaging in social spaces are the individuals who hold sway across multiple small networks; engagement of these individuals, who are trusted within their own groups, becomes the *sine qua non* of achieving broad exposure in a highly fragmented information environment

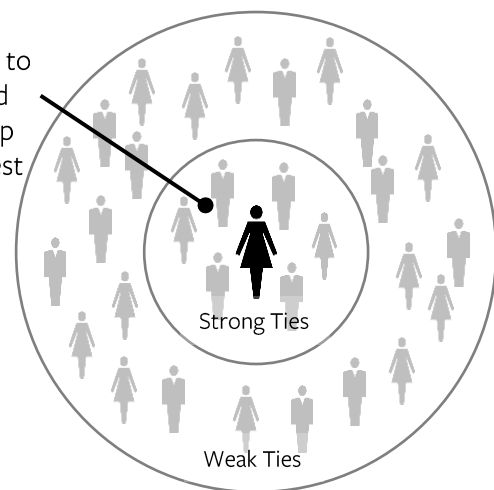
The Spread of Ideas in Social Networks

The Path to Persuasion

Persuasion beyond core group depends on influence of the messenger and targets’ receptivity to ideas

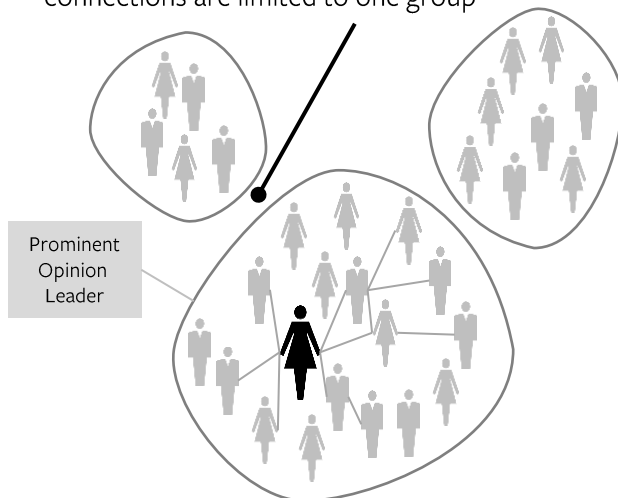


Generally, individuals are most receptive to ideas promoted by a small group of people closest to them

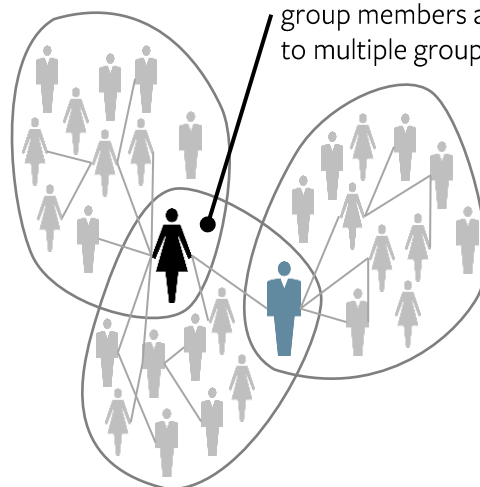


Connectedness Across Groups is Key to Transmission

Ideas do not spread when connections are limited to one group



Messages spread easily when group members are connected to multiple groups








Source: Duncan Watts and Peter Dodds, “Influentials, Networks and Public Opinion Formation,” 2007; Paul Adams, *Grouped*, 2011; Paul Adams, “How Your Customers’ Social Circles Influence What They Buy...,” 2011; person images by the Noun Project; National Journal Membership Research interviews and analysis.

► **Conclusion #59**

While subject matter experts, impassioned issue advocates, and other types of influentials fill the social space with rich narrative, an important new and extremely powerful influential type—the “issue-maker”—is disproportionately responsible for shaping and promulgating ideas that gain real traction on the social web

Understanding the Key Online Players

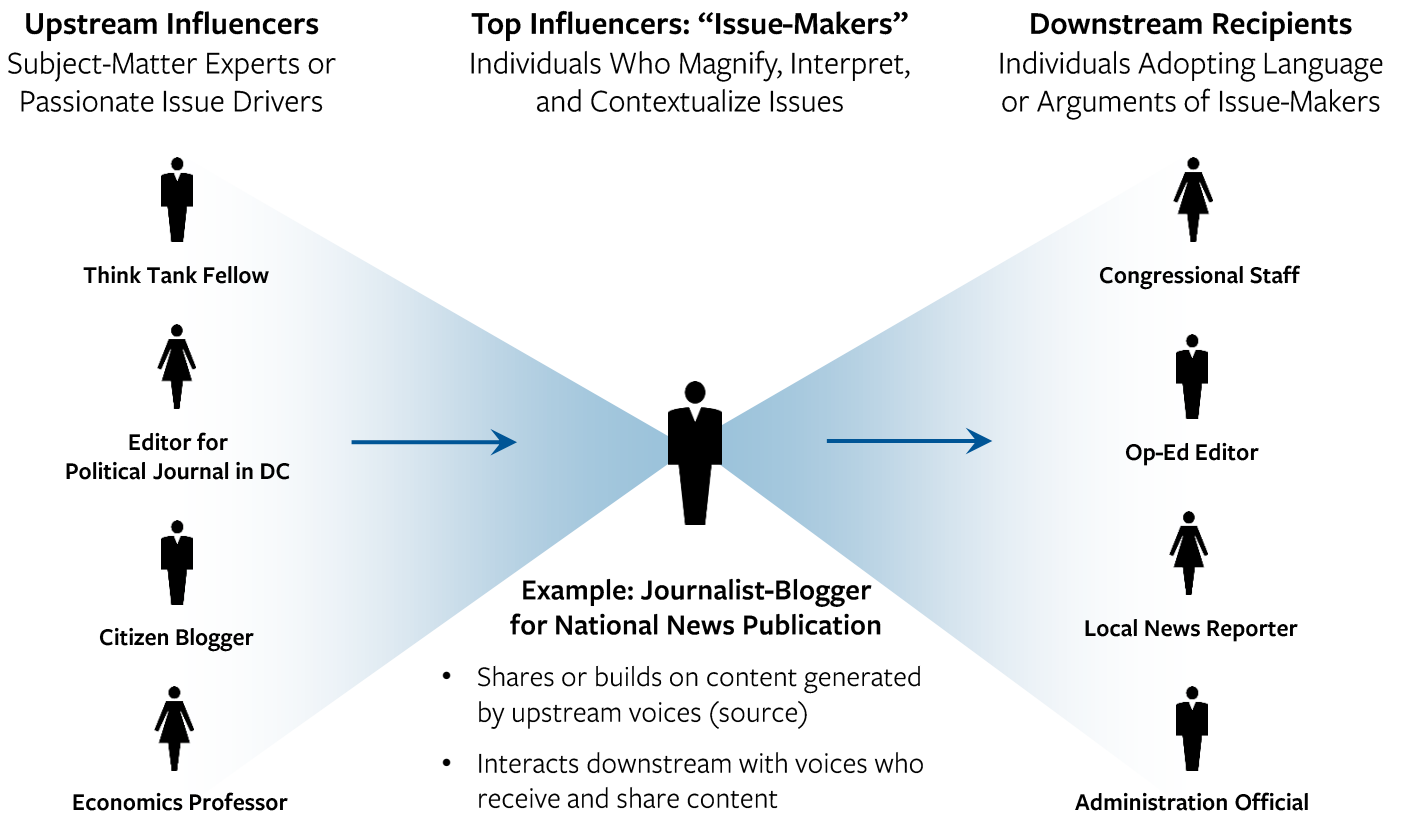
Profile	Social Role	Predominant Traits and Advocacy Impact
Subject-Matter Experts 	Idea originator	<ul style="list-style-type: none"> • Offer new ideas, exhibit expertise on niche issue • High number of followers within narrow terrain • Content source for Issue-Makers and Issue-Passionates • Upstream influencer of Issue-Makers
Issue-Makers 	Issue framer, contextualizer	<ul style="list-style-type: none"> • Not originators of new concepts, but framers of others' ideas, making those ideas broadly relatable and resonant • Widely-followed; content shared often and generates high volume of mentions and comments • Have power to influence fence-sitters and engage latent and passive audiences
Issue-Passionates 	Action takers	<ul style="list-style-type: none"> • Often contribute personal stories, emotional narrative, curated content, issue-specific commentary • Mobilize support for ideas and fire-up base supporters • Influence “issue-makers”
Accelerators 	Issue marketer	<ul style="list-style-type: none"> • Rarely create original content • Highly-connected across multiple networks • Share topical content in high volumes • Messages are widely shared by others • Engage latent audience
Online Observers 	Lurker	<ul style="list-style-type: none"> • Listen to conversations, absorb content • No (visible) online activity

► **Conclusion #6o**

The source of issue-makers’ influence is their crossover appeal; these individuals are deep enough on topics to engage credibly with others, and also have a knack for interpreting, contextualizing, and packaging ideas in a way that resonates (and promotes sharing) within and across many different communities

On the Hunt for Issue-Makers

One Organization’s Taxonomy of Influencers



► **Conclusion #61**

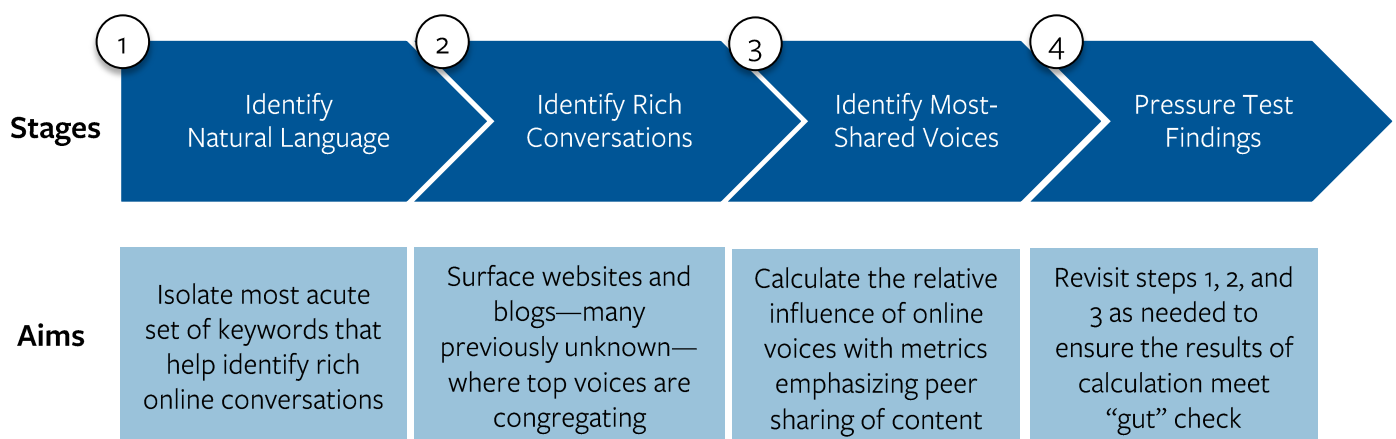
The effort required to identify issue-makers can be intensive; traditional markers of influence—credentials, proximity to power, resources—do not apply in the social context

► **Conclusion #62**

The best approach involves a regimented qualification process: finding the right language to use in searches, finding the most trafficked watering holes for related online conversation, and then identifying the most popular voices within those conversations

Systematizing the Search for Issue-Makers

Process for Identifying (Relevant) Influencers on the Social Web



Case in Brief



Profiled Organization: PhRMA
Organization Type: Trade Association

Headquarters: Washington, DC

- Works with consultant to construct “influencer map” charting relationships among top online voices discussing the organization’s policy priorities
- Arms communications department and advocacy functions with resulting insight to more effectively insert organizational perspectives into influential communities and conversations, increasing message reach and impact

► **Conclusion #63**

Step 1: Find keywords and phrases that are both related to the policy issues of interest, and, if searched for independently, produce a high volume of “hits” related to those same issues

► **Conclusion #64**

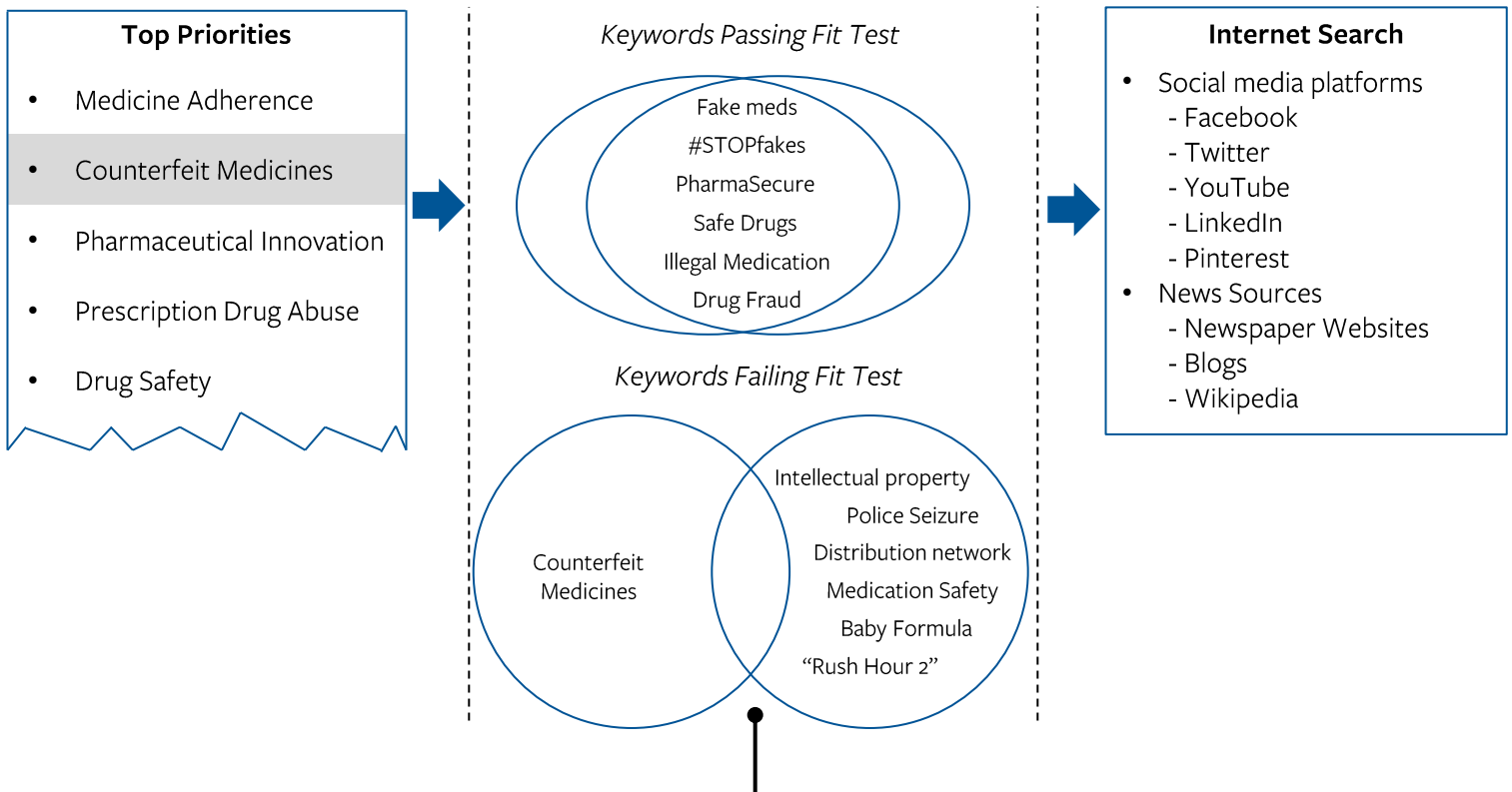
Step 2: Identify social media sites in which the language is most-commonly being used, and keep a log of individuals most commonly using the language; the log will be used in later analysis, and is most helpful if it also includes a measure of how frequently individuals use keywords of note

Favoring Keyword Acuity Over Volume

Each top priority...

...has associated keywords of high volume and acuity...

...which help identify who uses them on high traffic sites



- Pass/fail based on percentage of found conversations for each keyword or phrase that relates to the Top Priority
- Google Adwords, Google Search results, Tweetdeck/Hootsuite applications, and Word spider graphs can aid the analysis

► **Conclusion #65**

Step 3: From the log, choose a set of “top influencers” by evaluating not the volume of content that individuals generate, but the frequency with which others choose to share it; the choice to share indicates, above all other measures, that the author’s content successfully advances certain conversations and is packaged in such a way as to reflect well on those who engage with it

► **Conclusion #66**

Step 3 is made easier by scoring each individual on measures of sharing, engagement, interactivity; the methodology used by one organization in calculating the relative influence of each potential issue-maker, outlined in simplified form below, is noteworthy for the limited value it places on an individual’s volume of posts and number of connections

Calculating Influence of Online Voices *Giving Extra Weight to Markers of “Sharing”*

Illustrative Calculation of Twitter Influence

- Corporate Government Affairs office hoping to find most influential voices talking about a specific legislative issue on Twitter
- Creates scorecard with which to assess each potential influencer on a 1-10 scale across a set of key metrics, giving extra weight to the most common, interactive metrics

Influencer Candidate 2				
Influencer Candidate 1				
Metric	Score (1-10)		Weight	Score
Followers	3	✘	.10	.30
Retweets	8	✘	.40	3.20
Mentions	7	✘	.30	2.10
Replies	4	✘	.20	.80
				6.40

Additional Examples of Engagement Metrics

Facebook:

- Mentions
- Comments
- Likes
- Subscribers
- Wall posts
- Friends

LinkedIn:

- Connections
- Recommenders
- Comments

General Volumetrics to Consider *(not exhaustive)*

- Regularity of individual’s sharing
- Number of sharers

YouTube:

- Views
- Likes-Dislikes
- Shares
- Subscribers

Blogs:

- Comments
- Ping backs
- RSS subscribers
- Page views

► **Conclusion #67**

Step 4: Prioritize which individuals to target for dedicated offline or online relationship-development efforts based on their scores (and available organizational resources); optional indexing of scores facilitates segmentation of the influencer list

Force-Ranking Top Influencers

Tiered Approach to Engagement Maximizes Resource Efficiency

Relative Ranking of Top Online Influencers

	Influencer Score	Index Score	Influencer*	Role*	
<p>Tier 1</p> <p><i>Develop Relationships Offline and Online</i></p> <ul style="list-style-type: none"> • Invite Influencer to Speak at Association • Run Events • Encourage Contribution of a Guest Blog Post 	6.40	100	1. James Marren	Industry Website Blogger	
	6.20	96	2. Rachel Cooper	National Correspondent	
	6.00	93	3. Tracy Stone	Industry Website Blogger	
	6.00	93	4. Jeffrey Miller	DC Based Political Journalist	
	5.70	89	5. Ashley Collins	Trade Magazine Editor	
	5.70	89	6. Taylor Peterson	Citizen Blogger (Unaffiliated)	
	5.60	87	7. Nick Meyers	National Correspondent	
	5.50	86	8. Steven Hexter	Specialty Blogger (Niche Issue)	
	5.50	86	9. Alex Henderson	DC Based Political Journalist	
	5.30	83	10. Will Romanoff	Industry Blogger	
	5.30	83	11. Hugo Aparicio	Citizen Blogger (Unaffiliated)	
	5.20	81	12. Jen Watson	Trade Association Blogger	
<p>Tier 2</p> <p><i>Develop Relationships Online</i></p> <ul style="list-style-type: none"> • Leave Comments on their Blog Posts • Retweet their Content 	4.50	71	13. Erica Young	Freelance Journalist	
	4.50	71	14. Adrienne Byrd	Think Tank Fellow	
	4.40	69	15. Dana Alcorn	Policy Forum Leader	
	4.40	69	16. Josh Troy	Partisan Blogger	
	4.40	69	17. Kenneth Keeler	National Correspondent	
	4.30	67	18. Jason Gaspar	Prominent Professor	
	4.20	66	19. Daniel Simpson	Trade Magazine Journalist	
	4.20	66	20. Russell Street	Industry Website Blogger	
	<p>Tier 3</p> <p><i>Monitor</i></p>	3.70	57	21. Brian Crawford	Citizen Blogger
		3.50	55	22. Matthew Long	Think Tank Fellow
3.50		55	23. Trevor Morrill	Prominent Professor	
3.40		53	24. Leslie Powell	Partisan Blogger	
3.20		50	25. Millie Celentino	Data Scientist	

Inclusion of index score magnifies differences in relative influence, enables easier parsing of tiers

* Illustrative Example; Masks real names and roles

Source: National Journal Membership Research interviews and analysis.

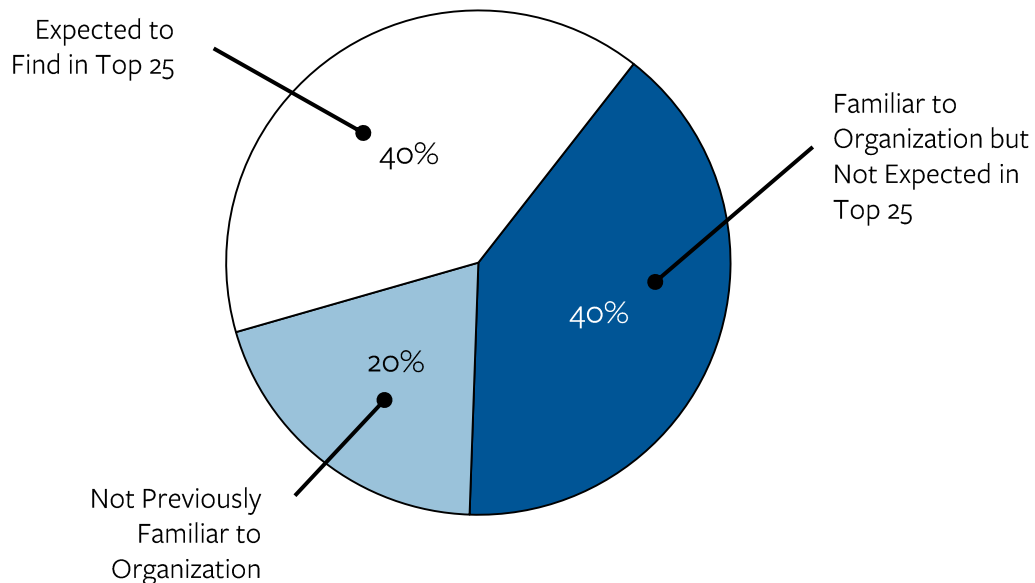
► **Conclusion #68**

Influencer scoring exercises frequently reveal large gaps in an organization’s understanding of who is and is not driving policy discussions in the online world; one organization, for example, found that its preconceived notions of whom would be found among the top-25 online influencers in its field was only 40 percent accurate

Re-Orienting Focus Toward Right Individuals

Mapping Exercise Reveals Many Surprises

**Organization’s Awareness
of Top 25 Influencers**



Implementation Tips—Updating the List

- ☑ Update issue-maker lists at least quarterly to ensure that they are fresh and reflective of current online dynamics
- ☑ Run new analyses when an advocacy goal or campaign is added to the agenda
- ☑ Pressure-test findings at each stage to ensure that findings do not deviate too greatly from expectations

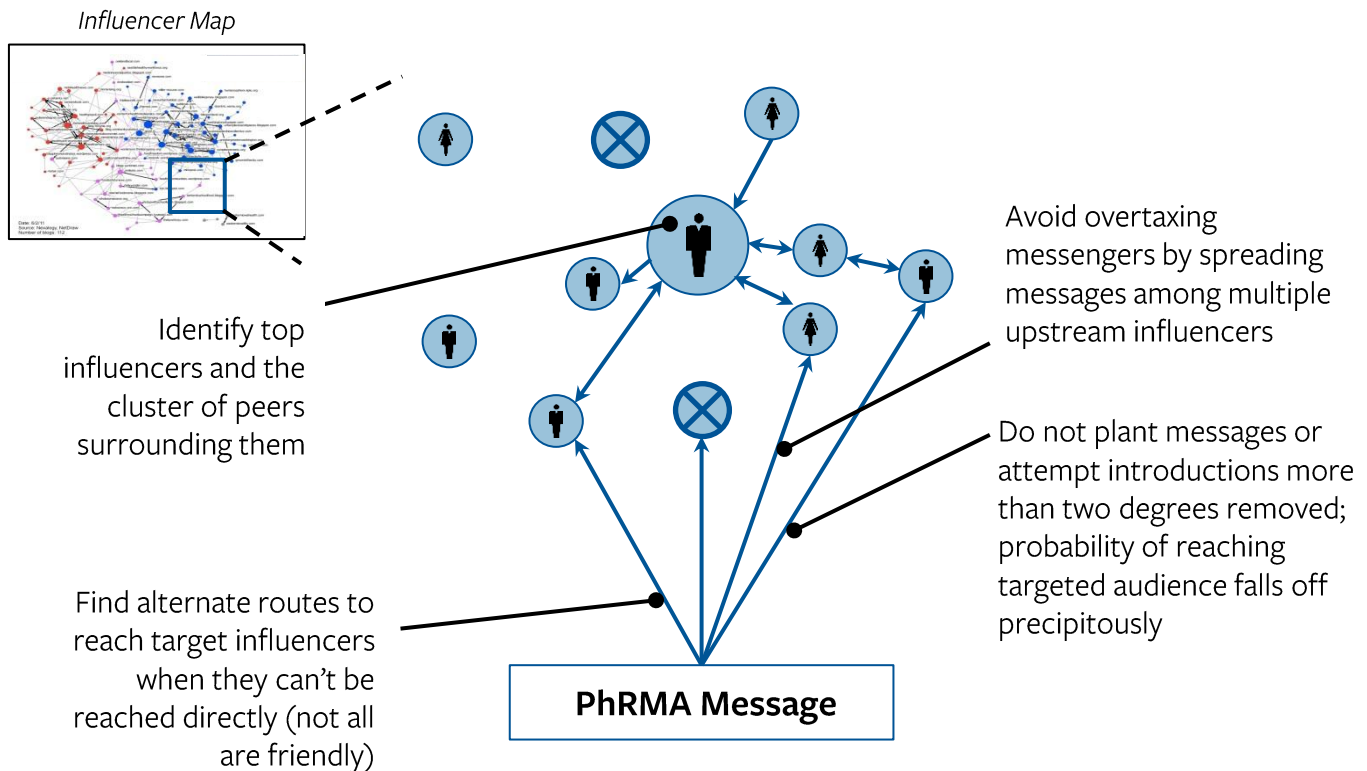
► Conclusion #69

Once top issue-makers are identified, organizations can map the relative importance, proximity, and interactivity of surrounding community members within the social network; understanding interactivity—in particular, who appears to influence whom—can be powerful in illustrating different paths for reaching the issue-makers directly

Selecting Where and How to Engage

Building and Using an Influencer Map to Reach Top Influencers

Application of Influencer Map



Implementation Tips—Engaging Issue-Makers

- ☑ As each influencer has a preferred method of communicating, a general rule of thumb is to use the platform historically preferred by the influencer (or the one currently in use)
- ☑ If private-channel communications don't elicit response, consider communicating in a public forum (blog comment, Twitter mention, etc.) that makes it difficult for the influencer to ignore comments
- ☑ Always support expressed points of view with evidence; share web links to research studies and/or data that reinforce arguments

Practice Assessment

Influencer Ecosystem Mapping

Low → High

Time Commitment: ● ● ● ● ○

Implementation Difficulty: ● ● ● ● ○

Required Degree of GA Involvement: ● ● ○ ○ ○

Impact: ● ● ● ● ○

Overall Grade: A-

A useful—if potentially expensive—tactic for all organizations. Model is most-effectively constructed in conjunction with specialized software or consultant support, though a low-end version can be built using a combination of observation and free tools.

Chapter Two: Strengthening Reputation through Strategic Online Engagement

This chapter explores approaches to building a positive identity in social media, protecting the organizational brand against social media attacks, and empowering staff to participate in relevant online dialogue—all in ways that reduce staff anxieties surrounding active engagement in social media channels

Positioning Opinion to Get Noticed – Key Findings

► Conclusion #70

Although many have been content with the passive (silent) activities of issue and influence tracking, an increasing number of advocacy organizations are seeking to find their own voice online

► Conclusion #71

Effective online advocacy reinforces a sense of genuine connection between organization and community using a variety of conversational strategies, including dedication to advancement of the online conversation, anticipatory acknowledgment of bias, and avoidance of “hierarchical” behavior (deeply frowned upon online!)

► Conclusion #72

In cases where an organization seeks to assign specific employees to speak on its behalf, it is important to select individuals who have some passion for online engagement and whose backgrounds (e.g., subject-matter expertise) will increase the likelihood of their acceptance in social media environments

► Conclusion #73

As important as how to engage online is when to engage: Instead of trying to build momentum around their own content, agile participants attach their content to existing conversational waves, ideally before clear sides have emerged with respect to the participants’ ideas or issues

Practice #3: Specialized Spokesperson Roles

Organization handpicks select group of employees possessing issue-level expertise and social credentials to serve as credible online participants in niche policy debates; designated spokespeople are assigned discrete policy “beats,” are given greater license to speak, and receive regular training to enhance their effectiveness as online influencers

Practice #4: Newsjacking

Organization recognizes and borrows the momentum of proximate, already-trending stories in its own communications; attaching the organization’s views and content to larger viral discussions through “right messaging, right timing” maximizes exposure of the organization’s own issue set

Defending Against Social Media Attacks – Key Findings

▶ Conclusion #74

The most obvious danger presented by social media is a sudden, unexpected attack on the organization’s positions, especially at sensitive points in the advocacy process; with early warning systems in place, it is often possible to predict and head-off trouble before it becomes perilously negative or personal

▶ Conclusion #75

When attacked unfairly, it is possible—even likely—that the community will rise to a person or organization’s defense, especially if that person or organization has demonstrated commitment to the community in the past, respected its rules of engagement, and evinced human qualities that call into play the rules of cocktail etiquette

▶ Conclusion #76

Experienced advocacy organizations therefore explicitly build-in time to allow the community to respond before taking action when under attack; in cases where direct response is required, these organizations take steps to minimize the “footprint” of public spats—for example, by publicly inviting opponents to take the conversation offline, or by equipping frontline employees to respond rather than escalating response to more senior levels

Practice #5: Criticism Response Flowchart

Organization codifies decision rules for monitoring and responding to negative commentary received over social media channels; rules enable frontline community managers to handle routine issues without senior-level oversight

Empowering Staff Members for Impact Advocacy – Key Findings

▶ Conclusion #77

When organizations seek to empower employees broadly—to speak as “fans” (rather than “ambassadors”) who humanize the institution’s positions and voice—most unknowingly scare the workforce into silence with social media policies that read like essays of discouragement; a more successful posture is one of continuous encouragement for sharing select, timely content that relates to current events

▶ Conclusion #78

Content breaches will inevitably occur, defying the efforts of even the best-prepared organizations; experts advocate immediate public transparency, apology if necessary, and a dash of humor if appropriate

Practice #6: Stoplight Communications Protocol

Organization employs a social media protocol that clearly delineates types of employee-authored content deemed acceptable, unacceptable, or requiring special approval; coupled with intranet resources and internal communications that encourage sharing, staff are empowered to message on behalf of organization with limited risk and oversight

Practice #3: Specialized Spokesperson Roles

Practice Description

Organization handpicks select group of employees possessing issue-level expertise and social credentials to serve as credible online participants in niche policy debates; designated spokespeople are assigned discrete policy “beats,” are given greater license to speak, and receive regular training to enhance their effectiveness as online influencers

Situation

Organizations desiring to inflect issue-level debates online find that using an institutional voice can foil efforts to form meaningful, two-way social dialogue. Communications staff, who might be called upon for support, can lack the bandwidth and specialized expertise required for acceptance as credible participants in issue-specific conversations.

Action

Organization designates select individuals from across functions—individuals possessing great storytelling abilities, as well as issue-specific knowledge related to the organization’s policy priorities—to serve as social media spokespeople. Spokespeople represent the organization and its positions online, and are aided in building a strong online presence and rapport through regular training sessions and group learning exercises. Moreover, regular meetings enable the sharing of best-found practices for inflecting niche community discussions.

Result

Though the program is still in first two years of operation, a number of spokespeople have been able to distinguish their voices in active policy debates and make new connections with top influencers.

Laws of Social Media in Action

- | | |
|--|--|
| <input checked="" type="checkbox"/> Community Contribution | <input type="checkbox"/> Collective Narrative |
| <input checked="" type="checkbox"/> Transparent Motivation | <input checked="" type="checkbox"/> Short Distances |
| <input type="checkbox"/> Anonymous Critique | <input type="checkbox"/> Quick Bursts |
| <input type="checkbox"/> Cocktail Etiquette | <input type="checkbox"/> Conservation of (Personal) Energy |
| <input type="checkbox"/> Crowd Arbitration | <input checked="" type="checkbox"/> ‘Selfish’ Sharing |

► **Conclusion #79**

Although many have been content to track issues and influence in social media to date, a great number of advocacy professionals now are actively speaking online—developing a voice for their own organizations and issues

► **Conclusion #80**

Effective voice in social media reinforces a sense of genuine connection with the community by using a variety of conversational strategies—dedication to the advancement of ideas and dialogue, anticipatory acknowledgement of bias, and avoidance of “hierarchical” behavior (deeply frowned upon online)

► **Conclusion #81**

The same rules apply to organizations (read: messaging from a corporate account) as to individuals; irrespective of platform, the voice must sound human—not like a press release—to promote sharing and dialogue

Attributes of a Voice that Carries

How to Be Heard on Social Media

Profile
Come As You Are

- Disclose your employer, location, background
- Do not use a generic avatar; personalize your identity

Content
Add to the Mix

- Balance personal and professional messages; be human
- Change topics from time to time
- Contribute original ideas
- Add new and relevant angles on issues
- Focus on issues of emotional resonance for audience
- Play to the Zeitgeist

Sharing Pattern
Reciprocity Rules

- Be polite in back-and-forths
- Source content and give credit where due
- Don't tweet the same message repetitively

Tone and Language
“No Snark” Zone

- Use common (outside) language
- Be emotive, alluring... but not distasteful
- Be personal
- Be humble, not hierarchical
- Show your “fun gene”

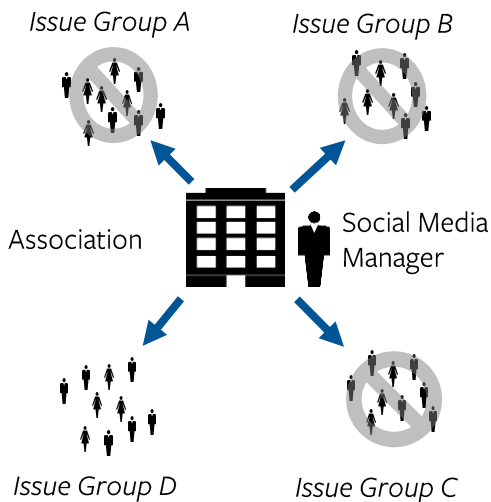
Especially important for being heard by policymakers; topics where congressional staff apply stringent “hacks and flaks” filters when listening online

► **Conclusion #82**

Organizations that lack either dedicated expertise for communicating policy specifics, or the human (vs. the institutional) voice required to gain purchase in important niche conversations, will often times find themselves shut-out of relevant online discussions

Trouble Accessing Issue-Level Debates *Confronting a Trust Deficit and Resource Limitations*

No Purchase in Important Niche Conversations



Reason #1: Lacking Expertise

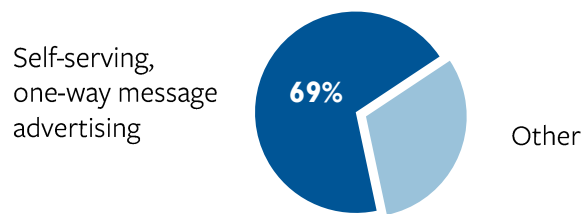
Communications Department's Limitations

“What has been hard for us is finding time to become regular contributors in all of the niche discussions—the ones that ultimately feed and influence broader debate—happening at the issue level. And frankly, even if we did, few on our team have the expertise to be credible voices in those debates.”

*Director of Communications
Large Trade Association*

Reason #2: Suffering a Trust Deficit

*Perceived Corporate Motivation for Using Social Media
Survey of Public (N = 1,000)*



Source: Allstate - National Journal Heartland Monitor XIII: Networked Nation, June 2012; images from the Noun Project; National Journal Membership Research interviews and analysis.

► **Conclusion #83**

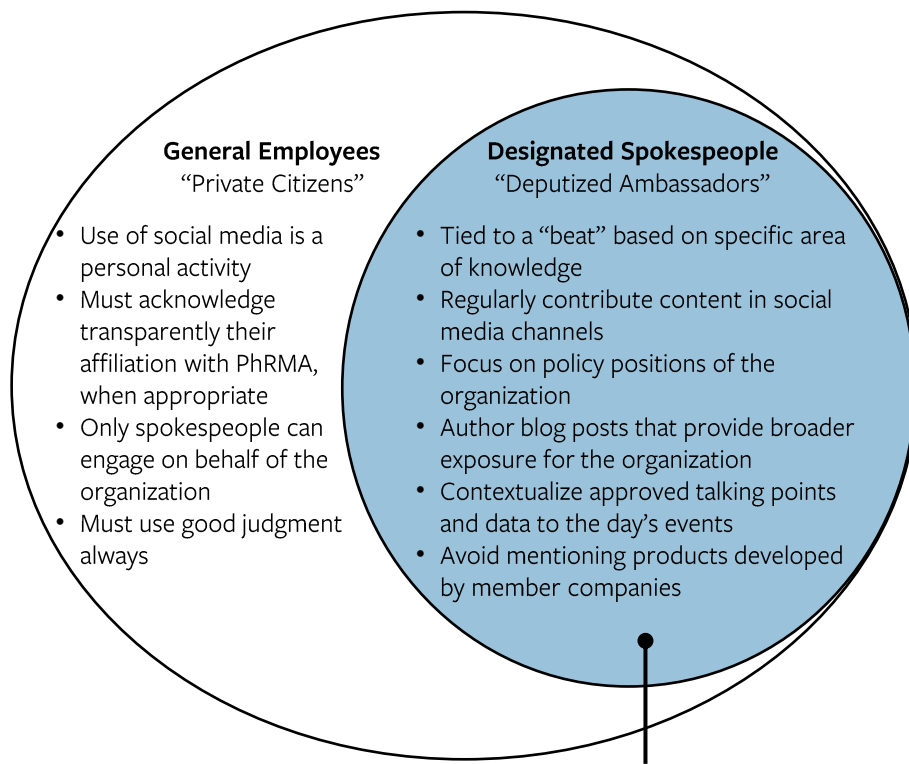
One Solution: Assigning specific employees—those with both topic expertise and social credentials—to speak on the organization’s behalf in digital conversations of importance; notably, most-successful models do not weigh heavily on the Communications staff, but rather on any employees capable of humanizing and giving credibility to the organization’s positions

Validating and Humanizing Organizational Positions

Recruiting Employee Experts with Voices That Carry

A Two-Tiered Social Media Policy

Roles and Rules for Speaking Online



Majority of spokespeople are based outside of communications function and contribute ~5-10% of their time to the spokesperson role

Characteristics of Handpicked Spokespeople

Expertise

- ✓ **Subject Matter Depth:** Possess deep knowledge and existing relationships in assigned beat area
- ✓ **Broad Organizational Knowledge:** Represent a variety of functional areas (Law, Research, Government Affairs, etc)

Social Credentials

- ✓ **Storytelling Capabilities:** Capable of translating dense policy dialogue into compelling human voice
- ✓ **Social Media Disposition:** Comfortable communicating over social media platforms
- ✓ **Passion for Cause:** Believe strongly in the mission of the organization and beat issues

Case in Brief



Profiled Organization: PhRMA
Organization Type: Trade Association

Headquarters: Washington DC

- Handpicks employees to serve as online spokespeople for the organization; tasks representatives with contributing regular blog content
- Requires spokesperson training and discussion to cultivate a voice that is credible and welcomed in exclusive and powerful online communities hosting niche, issue-level discussions

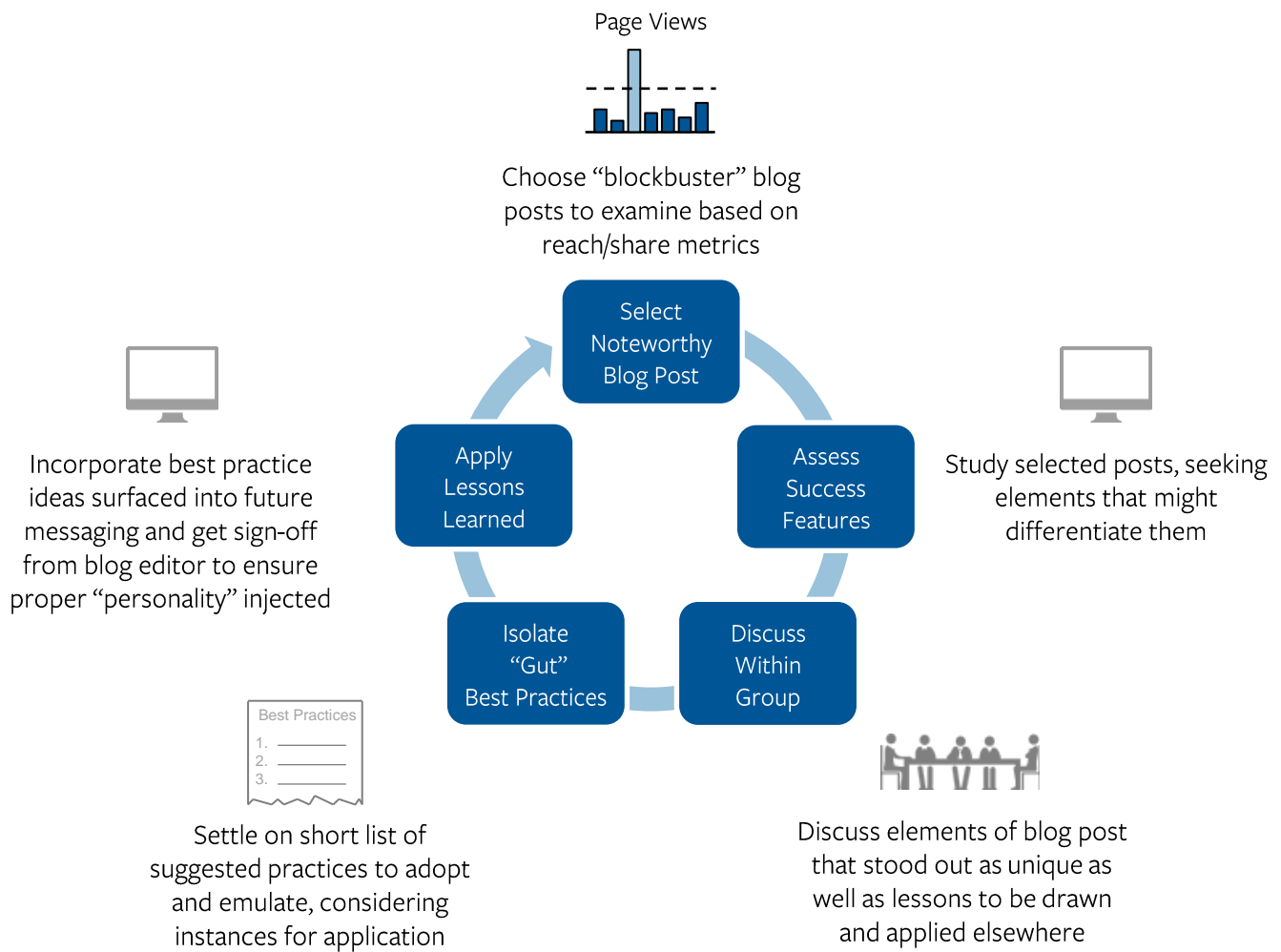
► **Conclusion #84**

Periodic group sessions exploring the makings of blockbuster social media content allow for teasing-out best practices on infusing personality into messaging; deep-rooted tendencies to speak in an institutional voice are most-effectively resolved through regular education, discussion, and insistence that content pass a “personality test” prior to posting

Modeling Effective Voice for the Social Web

Integrating Best Practices at Regular Intervals

Group Exercise at Training Session



Source: PhRMA; images from the Noun Project; National Journal Membership Research interviews and analysis.

► **Conclusion #85**

Executed efficiently, a specialized spokesperson program requires less than 10 percent of internal experts' time and, eventually, positions individuals representing the organization as issue-makers rather than voices in the crowd

► **Conclusion #86**

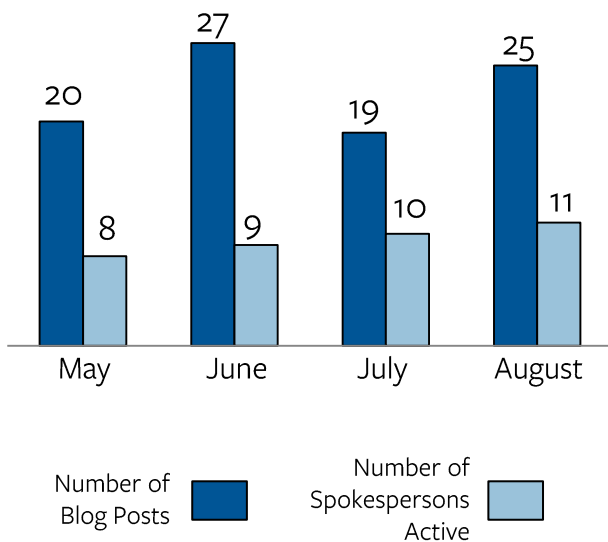
A Place to Start: Individuals and organizations are advised to join important conversations wherever they are already occurring; meaningful dialogue is rarely generated by beginning a public speech on owned platforms and social media streams

► **Conclusion #87**

Planting Seed Corn: Patience is required to reach “valued contributor” status; credibility may take time to build

Earning a Place in the Discussion

Monthly Contribution to Blog Activity



Twitter Follower Analysis

Valuing Quality Over Quantity

“Our spokespeople are making great progress building online profiles by developing meaningful, transparent connections with the right influencers. Their success is measured by their impact on relevant conversations, not by volume of posts or followers.”

*Christian Clymer
Deputy VP of Public Affairs
PhRMA*

► **Conclusion #88**

The spokesperson concept can be scaled to meet the needs of any organization, irrespective of size or financial circumstances; tips below offer suggestions as to how such a program can be executed with minimal resources

► **Conclusion #89**

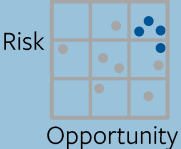




Among the options mentioned, two are particularly noteworthy for their potential ROI: First, the establishment of a “beat” system can focus the social media commentary of internal experts on areas of highest risk and opportunity

► **Conclusion #90**

Second, borrowing heavily from peer voices in the public domain can represent one way to quickly generate quality content

Leveraging the Investment

Elements of Successful Program Implementation

<p>Beat Assignments</p> 	<ul style="list-style-type: none"> • Prioritize high-risk, high-opportunity policy areas (start small) • Selectively choose credible messengers, timely story lines • Grow team as needs, time, and resources permit
<p>Social Media Etiquette</p> 	<ul style="list-style-type: none"> • Encourage authentic voice that adds to debate • Use positive tone, conform to group norms in all interactions • Avoid provocative or controversial issues (until expert) • Acknowledge value of community-generated content
<p>Group Learning</p> 	<ul style="list-style-type: none"> • Select markers of a great post, and teach through example • Tailor coaching and training resources as performance requires • Offer peer recognition to drive engagement • Incent application of identified best practice; assign an editor
<p>Blog-Twitter “Loops”</p> 	<ul style="list-style-type: none"> • Encourage personalized Twitter handles • Promote blog content on multiple platforms of value to debate • Speed transition from broadcasting to community-building
<p>Third-Party Content</p> 	<ul style="list-style-type: none"> • Borrow stories from individuals you wish were on your payroll • Invite external allies to speak on your platform (more is better) • Reinforce arguments made by friendly voices • Complement, not supplement, peer focus

Practice Assessment

Specialized Spokesperson Roles

Low → High

Time Commitment: ● ● ○ ○ ○

Implementation Difficulty: ● ● ● ○ ○

Required Degree of GA Involvement: ● ● ○ ○ ○

Impact: ● ● ● ○ ○

Overall Grade: B+

Worthy of serious consideration by all organizations, though execution is easier for large offices. The most-effective model engages multiple, media-savvy technical experts from different backgrounds and departments, though small offices also can cultivate effective digital voices (from own staff and beyond).

Practice #4: Newsjacking

■ Practice Description

Organization recognizes and borrows the momentum of proximate, already-trending stories in its own communications; attaching the organization's views and content to larger viral discussions through "right messaging, right timing" maximizes exposure of the organization's own issue set

■ Situation

Organizations attempting to make messages "go viral" find it difficult to manufacture widespread sharing of content. As a result, their desired discussions never reach the more casually engaged supporters or the potential new supporters who simply lack familiarity with the organization or its issues.

■ Action

Organization monitors offline and online information resources—e.g., news—for trending discussions that relate, if distantly, to a policy priority. When these discussions are found, staff quickly attach previously created, sharable content to related conversations in social media. Evocative messaging is used to draw new connections and encourage engagement by the community. Standing procedures related to media monitoring, content attachment decisions, and attachment timing prevent over-investment of resources.

■ Result

By attaching to already trending issues and entering conversations at prime moments, organizations accomplish two things: first, engaging in new ways with current network members; second, ensuring their messages reach the "line of sight" of potential supporters belonging to other online communities.

■ Laws of Social Media in Action

- | | |
|---|---|
| <input type="checkbox"/> Community Contribution | <input checked="" type="checkbox"/> Collective Narrative |
| <input type="checkbox"/> Transparent Motivation | <input type="checkbox"/> Short Distances |
| <input type="checkbox"/> Anonymous Critique | <input checked="" type="checkbox"/> Quick Bursts |
| <input type="checkbox"/> Cocktail Etiquette | <input checked="" type="checkbox"/> Conservation of (Personal) Energy |
| <input type="checkbox"/> Crowd Arbitration | <input type="checkbox"/> 'Selfish' Sharing |

► **Conclusion #91**

The near-universal aspiration among advocacy professionals to manufacture viral messages for a large group of stakeholders is beyond reach; no algorithm yet exists to predict—or aid in production of—content that is viral on-demand

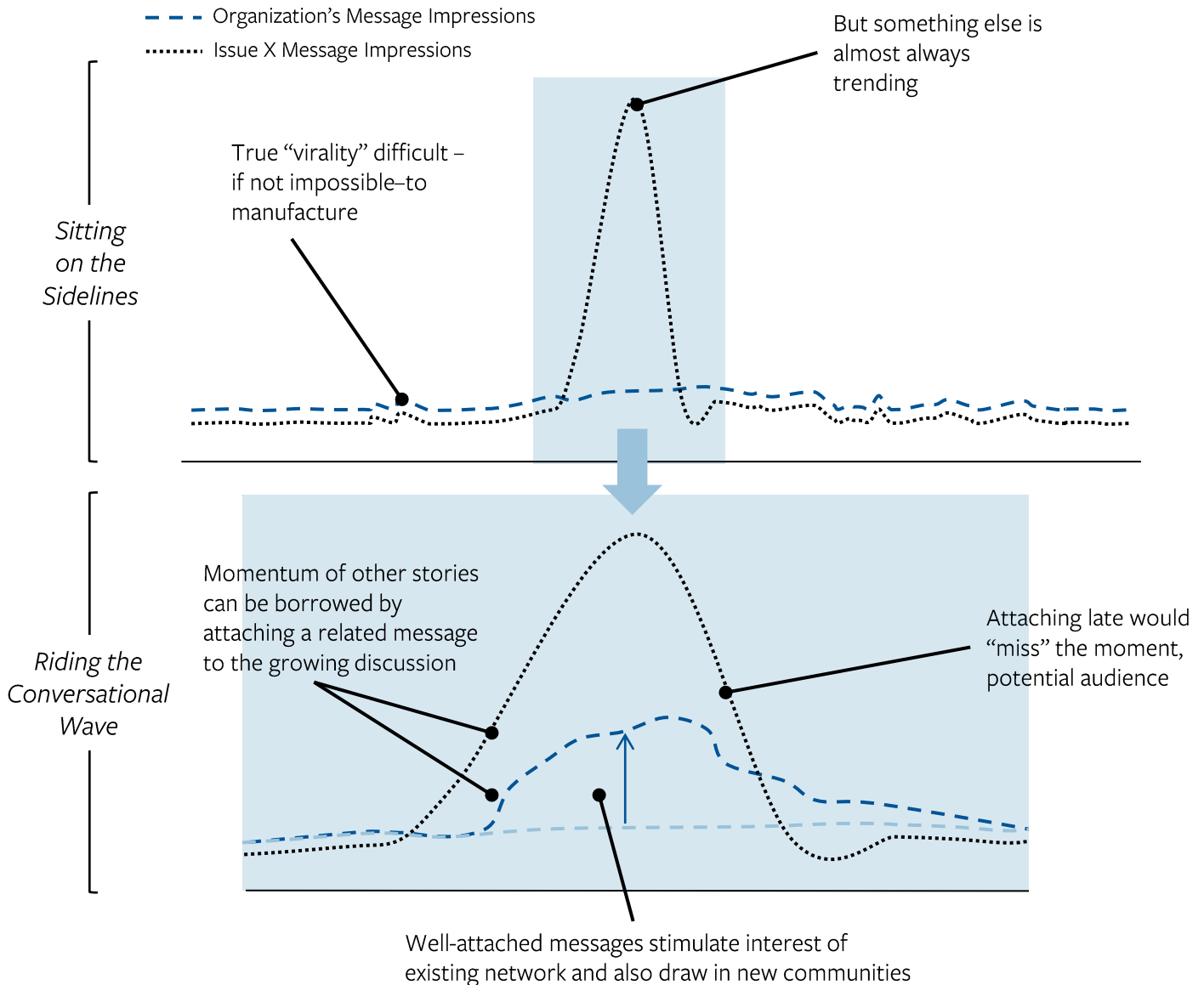
► **Conclusion #92**

That said, advanced players are attaching their content to existing or rising conversational waves—the already-trending conversations that materialize organically every day

Borrowing Momentum to Increase Message Visibility

Message Impressions Over Time

Illustrative



► **Conclusion #93**

Skillfully “borrowing” momentum from a trending conversation requires excellent timing, a high level of skill in associative messaging, and ready-to-use content for deployment in the larger conversation

► **Conclusion #94**

Successful practitioners place a premium on speed in assessing the opportunity and proceeding when appropriate; fast decision-making both limits the time and resources spent on the activity and ensures entry into the conversation before it has crested (to maximize exposure)

Considering Newsjacking Opportunities

A General Process Outline

#1

Identify Trending Content



- Skim various media platforms daily for breaking/trending news or developments related to the organization’s policy priorities
- Isolate news, specific articles, quotes, and other forms of phenomena to serve as carriers of organizational messages

#2

Validate Potential Waves



- Use combination of volumetric data, gut observation to gauge interest levels within organization’s targeted stakeholder community
- Check not only for commentary but also capacity to drive sharing and interactivity within and across social media platforms

#3

Attach Organizational Messaging



- Attach approved messaging, organizational positions to currently trending phenomena in thoughtful, creative manner
- Match tone and or language used by stakeholders and encourage those exposed to content to share or take an action

► **Conclusion #95**

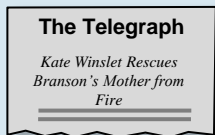
There are three distinct types of media moments to be Newsjacked—breaking news, lingering headlines, and cultural phenomena; these moments are distinguished foremost by how long they remain a relevant part of the public consciousness

► **Conclusion #96**

In all cases, sharable messages that draw creative connections between the trending theme and an organization’s policy message have the highest likelihood of getting noticed; punchy photos, videos, and data points can attract individuals who are interested in the message but not part of the organization’s regular audience

Attaching Message to Crowd-Attracting Content Choosing Ridable Waves

Breaking News: 1-3 Day Timeframe



Actress Kate Winslet saves a life during mansion fire...



...story picked up by London Fire Brigade as illustration of need for fire safety education...



...and featured on LFB blog post where Winslet invited to a safety seminar

- Earned media:*
- BBC News
 - New York Post
 - Vogue

Lingering Headlines: 1-3 Week Timeframe



During debate season, presidential candidate states will cut PBS funding if elected...



...sparking internet users to protest potential funding cuts via Big Bird memes...



...allowing PBS to place ads where memes searched, assert PBS value through Twitter and microsite, rally support

- Sharing in single day:*
- Retweeted 8,696 times
 - Reached 1,373,889 followers
 - Added 5,000+ new followers

Cultural Phenomena: 1-3 Month Timeframe



Singer Carly Rae Jepsen produces catchy hit song "Call Me Maybe"...



...leading AARP to recognize song's potential to bridge generation gaps...



...and inspiring AARP to create own version encouraging youth to call their grandparents on Grandparent's Day

- Viewing:*
- Watched 133,000+ times on YouTube alone
 - Story picked up by news sites online and local news sites across country

► **Conclusion #97**

First, Do no Harm: Newsjacking is not a riskless venture, and considering probability of harm versus benefit is a must for the social media user; anxieties regarding potential backlash from newsjacking should be heeded in situations where the cost-benefit is uncertain

The Go/No-Go Decision

Self-Tests for Determining Whether or Not to Newsjack

The Critical Quiz for Any Emerging “Media Moment”

		Yes	No
First three tests can be met in the moment...	• Is the trending issue or news tied in any obvious way—or could it be tied in any obvious way—to our organization, and/or one of our top-three priorities?	_____	_____
	• Can we add a new, relevant perspective that might connect with the audience at a values level?	_____	_____
	• Can we add a fresh, catchy, and fun angle on the subject that is also tasteful (and gentle)?	_____	_____
...while meeting last test requires preparation	• Do we have credible, appealing, shareable content that makes our organization a plausible conversation partner?	_____	_____
<i>If “No” to any of the above questions, do not attempt a newsjack</i>			

Zones of Comfort for a Particular Newsjacking Situation



► Conclusion #98

A variety of tactics can routinize and streamline the practice of newsjacking; tactics that restrict and focus time spent on newsjacking opportunities are of particular value, as they ensure that resource investment does not exceed potential upside

Creating Option Value

How to Make Newsjacking Easier

Prepping for Quick Response



Bank of (Shareable) Content

- Photos, quotes, video testimonials, infographics—visuals that “travel well”
- Content covering expert opinion and human interest (emotionally-driven) for use when needed
- Associative messaging examples

Monitoring for Right Moments



Plans for Known Events

- Recorded dates of relevant events—especially release of annual reports that pose challenges
- Preparation of counter-arguments, which can be posted and attached to opposition hashtags (for defusing attacks, earning media coverage)

Being Frugal with Time Invested



Time Investments

- 20 minutes per day to monitor, respond to breaking news
- Policy of backing-off immediately if no uptake by community
- Additional time invested to stoke conversation when entry to larger discussion is earned



Media Moment Scans

- Multiple phrasings of key organizational priorities entered into social media search functions, saved for daily exploration
- Alerts from various sites for keyword matches



*Speaking Timeframes**

- Twitter window: between 1pm and 3pm EST Mon through Thurs (nights after 8pm and Fridays after 3pm are lowest uptake times)
- Facebook window: mid-day is best; before 8am and after 8pm worst

*As of publication date

Source: Images from the Noun Project; National Journal Membership Research interviews and analysis.

Practice Assessment

Newsjacking

Low → High

Time Commitment: ● ○ ○ ○ ○

Implementation Difficulty: ● ● ● ● ○

Required Degree of GA Involvement: ● ● ● ○ ○

Impact: ● ● ○ ○ ○

Overall Grade: B

Worthy of consideration for organizations with significant resources dedicated to social media. Success is heavily dependent on having a pre-authored action plan for identifying relevant conversational waves, on speed to action, and on being highly familiar with rules of interaction in social media.

Practice #5: Criticism Response Flowchart

Practice Description

Organization codifies decision rules for monitoring and responding to negative commentary received over social media channels; rules enable frontline community managers to handle routine issues without senior-level oversight

Situation

Even though messages posted in social media conversations about an organization or its policy positions may be overwhelmingly positive, periodic instances of negative commentary do occur. Senior leaders at organizations early in their social media experience often engage in rapid response to every such situation, investing a great deal of time and resources. Recurring internal debates about how to manage negative situations can overwhelm staff day jobs and reach unsustainable levels of resource investment.

Action

Organization develops decision rules that empower the frontline social media manager to respond to most negative comments directly. The decision rules and response protocol are based on effective past interventions, as well as accumulated learning about right conversational tone and community roles in social media. Borderline cases—those lacking a clear course of action—are escalated to increasingly senior staff until an appropriate decision can be made; most often, issues are escalated only one level—to a small, experienced team of communications staff that can handle issues in a timely fashion.

Result

Protocols have significantly reduced—nearly eliminated—senior leadership time spent on issue resolution. No crises have emerged as a result of senior leader disengagement from the day-to-day process.

Laws of Social Media in Action

- | | |
|--|--|
| <input type="checkbox"/> Community Contribution | <input checked="" type="checkbox"/> Collective Narrative |
| <input type="checkbox"/> Transparent Motivation | <input type="checkbox"/> Short Distances |
| <input checked="" type="checkbox"/> Anonymous Critique | <input type="checkbox"/> Quick Bursts |
| <input checked="" type="checkbox"/> Cocktail Etiquette | <input type="checkbox"/> Conservation of (Personal) Energy |
| <input checked="" type="checkbox"/> Crowd Arbitration | <input type="checkbox"/> 'Selfish' Sharing |

- ▶ **Conclusion #99**
Fears that engagement in social media will expose the organization to negative public critiques have dampened the appetite for involvement among many advocacy professionals
- ▶ **Conclusion #100**
In truth, discussions related to the organization are bound to occur irrespective of the organization's participation; much greater risk is posed by remaining an outsider to relevant debates—in essence, abdicating organizational narrative—than being an insider to them
- ▶ **Conclusion #101**
Even leaders who have permitted organizational expansion into social media, however, remain in a near perpetual state of high anxiety about very public attacks and mistakes that could promise blowback
- ▶ **Conclusion #102**
The Result: Regular staff “fire drills” to address problematic posts often devour office productivity; up to 15 percent of senior staff time has been reportedly diverted
- ▶ **Conclusion #103**
While negative discussions and interactions online are inevitable, they can largely be managed in such a way as to limit or eliminate lasting damage
- ▶ **Conclusion #104**
The quickest and least expensive option for managing crises is crafting a response protocol that can be executed effectively by frontline employees

► **Conclusion #105**

A pre-determined criticism response plan can helpfully codify the executive-approved process for handling negative comments; a comprehensive framework allows the community manager to address attacks quickly and effectively without requiring intensive senior-level supervision

► **Conclusion #106**

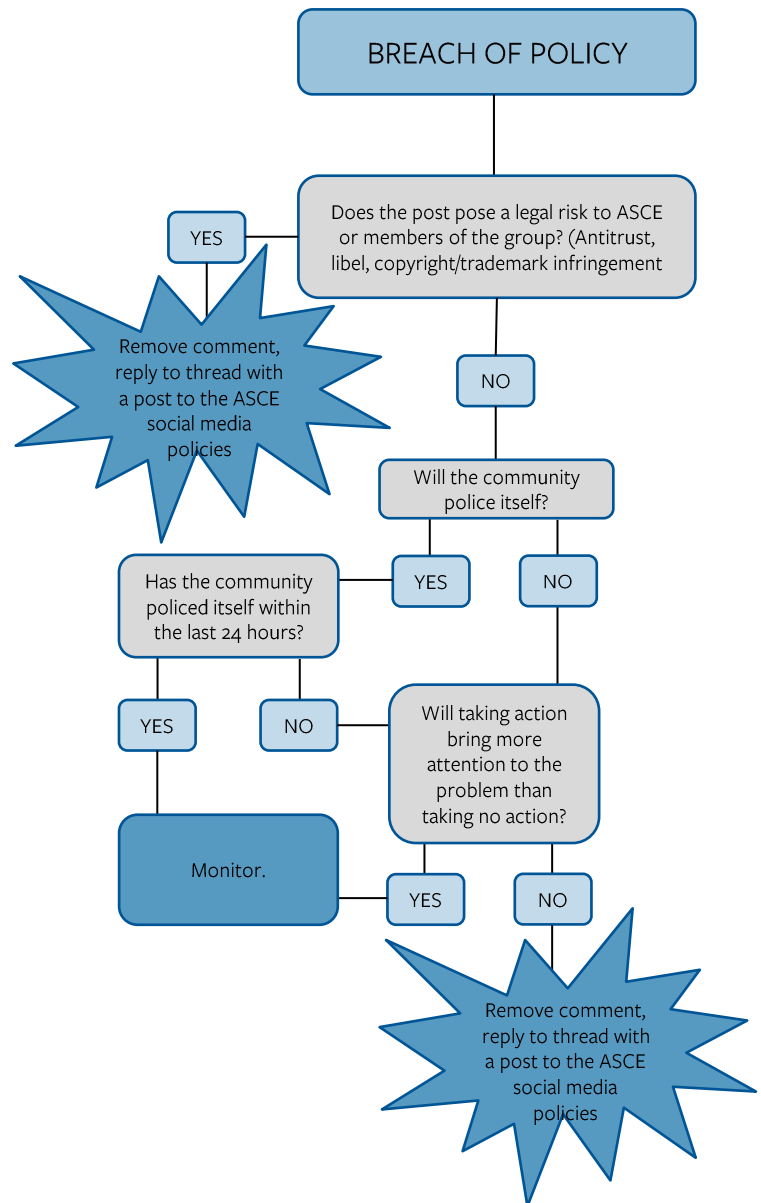
Clear breaches of the organization’s stated social media policy should prompt immediate action, always; swift response is advised when issues run risk of snowballing into more-critical challenges or pose clear legal risks

Inculcating

Protocol for Breach of Policy

Flowchart Principles

- #1 Respond promptly to clear breaches of policy—especially those with legal implications—to check true-risk situations
- #2 In other cases, pause to first allow community policing; community-driven defense or resolution of controversy trumps organization-led intervention in effectiveness
- #3 When interjection is required, have the person closest to the issue reply, not necessarily the most senior



Case in Brief



Profiled Organization:
American Society of Civil Engineers



Organization Type:
Professional Association

Headquarters: Reston, VA

- In collaboration with consultants, developed a decision tree to codify an executive-approved framework for handling negative social media commentary
- Employs decision tree to empower frontline Community Manager (Social Media Specialist) to quickly handle emergent issues absent senior input

Source: American Society of Civil Engineers; SocialFish; National Journal Membership research interviews and analysis.

► **Conclusion #107**

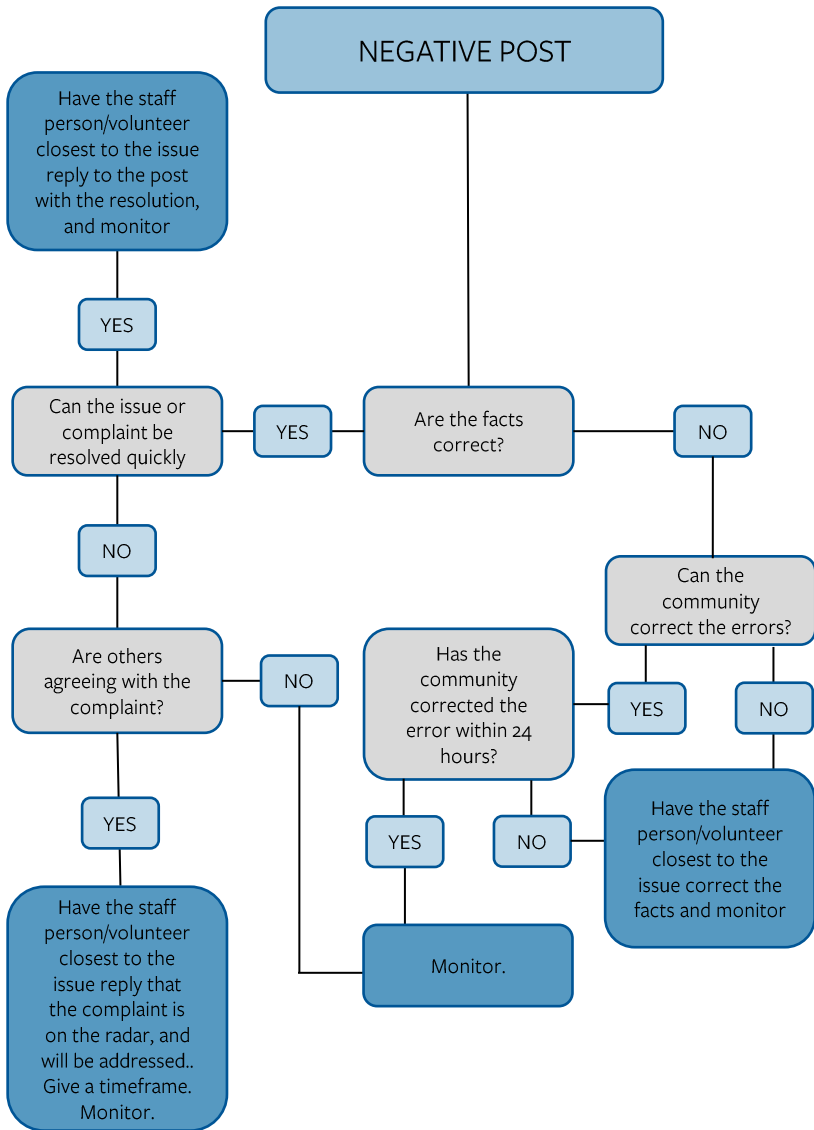
In most cases, however, a brief pause should be observed before dealing with negative posts; the purpose of pausing is to give members of the community an opportunity to police the incident without organizational intervention

► **Conclusion #108**

The insight here is that the organization’s engaged third parties—also affected by negative posts—can provide the most credible (and inexpensive) response to social media attacks; even relatively small organizations can make quantum leaps in efficiency by allowing the community to defend the organization against assault

Measured Response

Protocol for Negative Posts



Implementation Tips—Hardwired Response

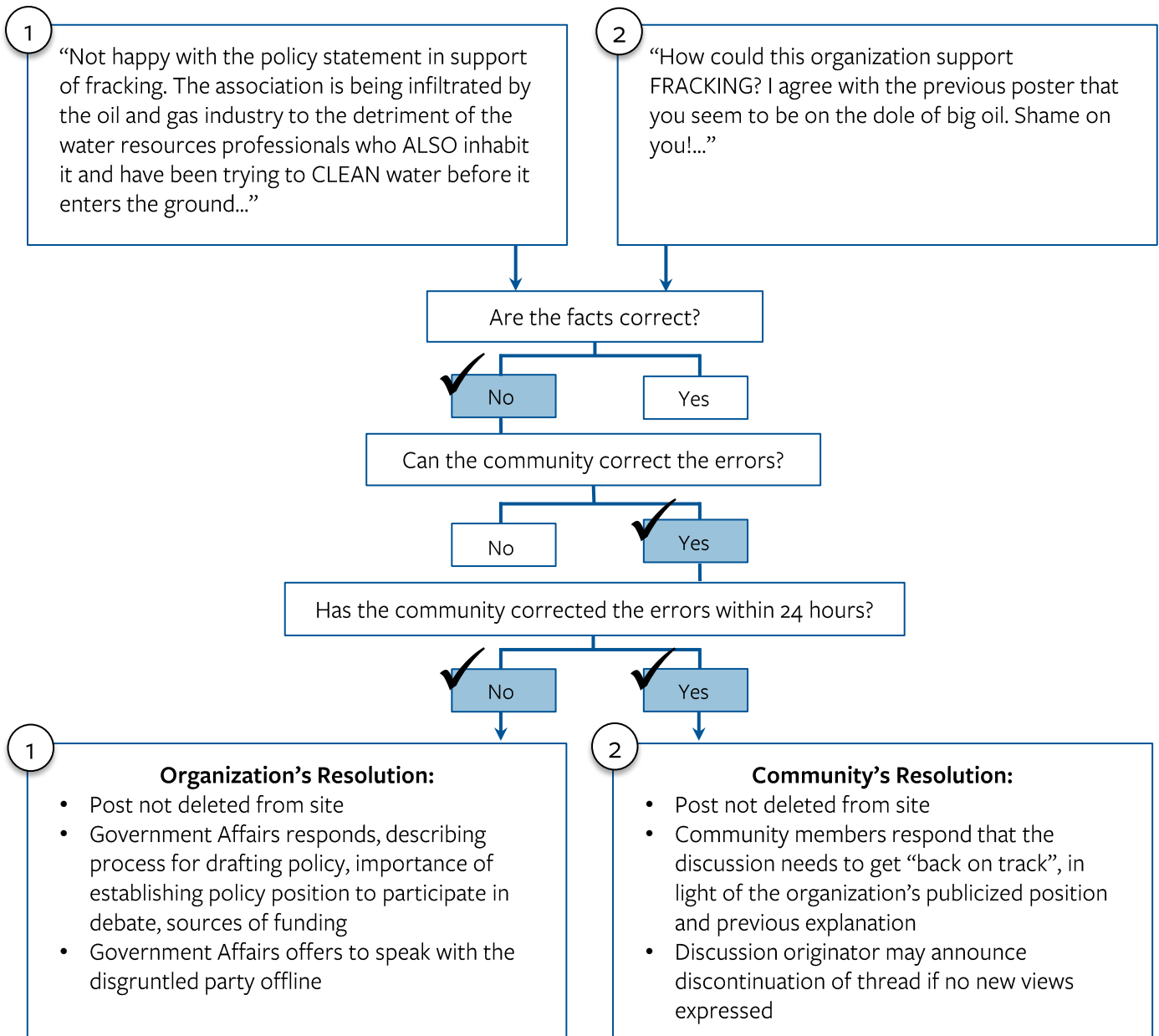
- ☑ Tone: Respond in a tone that positively reflects on the organization and its mission
- ☑ Sourcing: Reinforce your response by citing sources and including URLs
- ☑ Platform: Focus on responding to the most active and relevant social media sites
- ☑ Presence: Acknowledge comments, even those that express dissenting opinions

► **Conclusion #109**

Irrespective of community response, it is critical to allow some number of negative comments to remain visible on the organization’s social media platforms; purely positive discussion threads appear disingenuous and beg (repeated) negative commentary

Giving the Community a Chance

Fictitious Case for Illustrative Purposes



► **Conclusion #110**

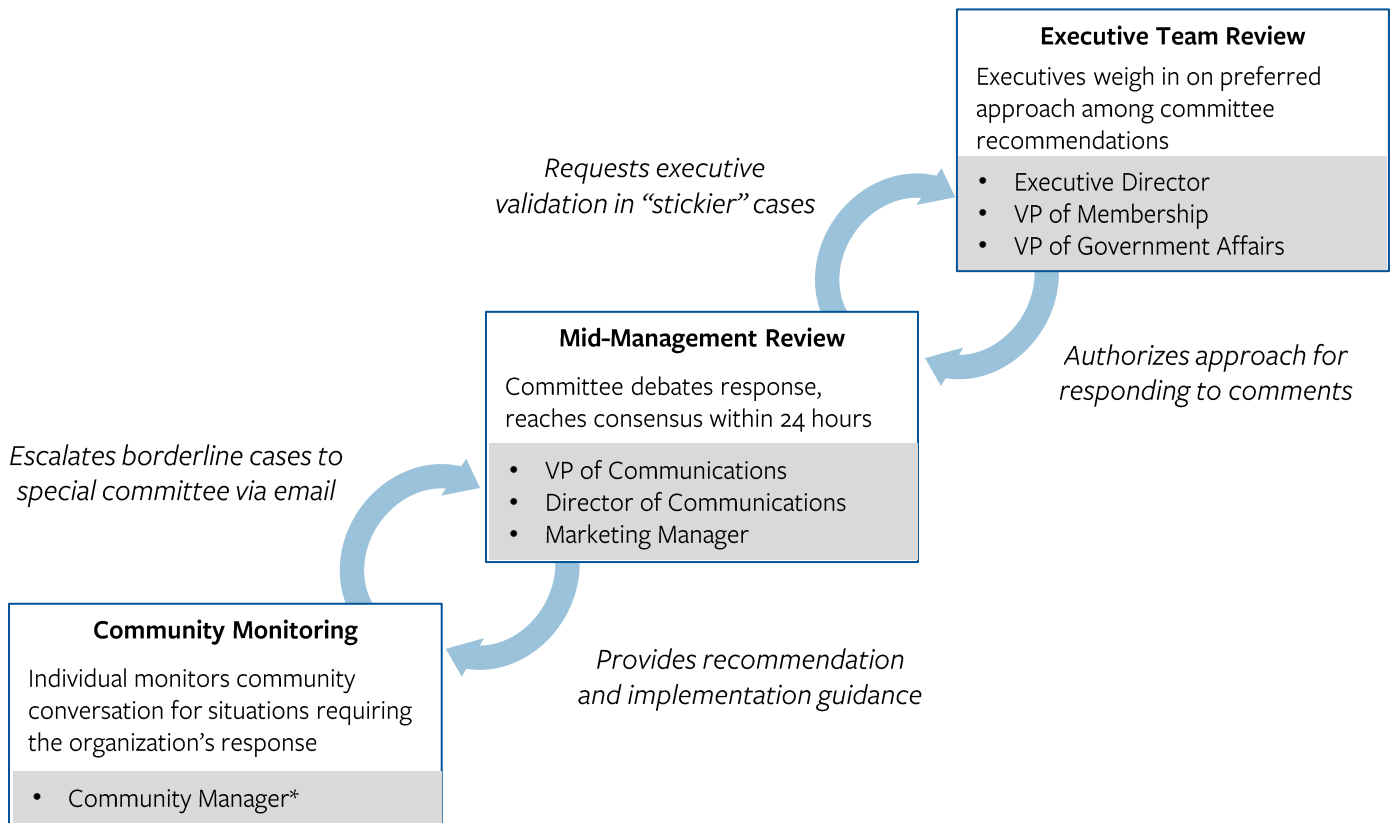
Decision trees do not—and will not—enable front-line staff to manage *all* incidents of organizational concern in social media; executives should continue to engage on a narrow set of issues

► **Conclusion #111**

Shared understanding of escalation cues, as well as hardwired processes for gathering executive guidance, can improve speed of issue resolution in sticky or puzzling cases

Escalation Process for Borderline Cases *Getting Started—A Consultant’s Guidance*

Triage Protocol for Questionable Scenarios



*Role denotes Social Media Specialist

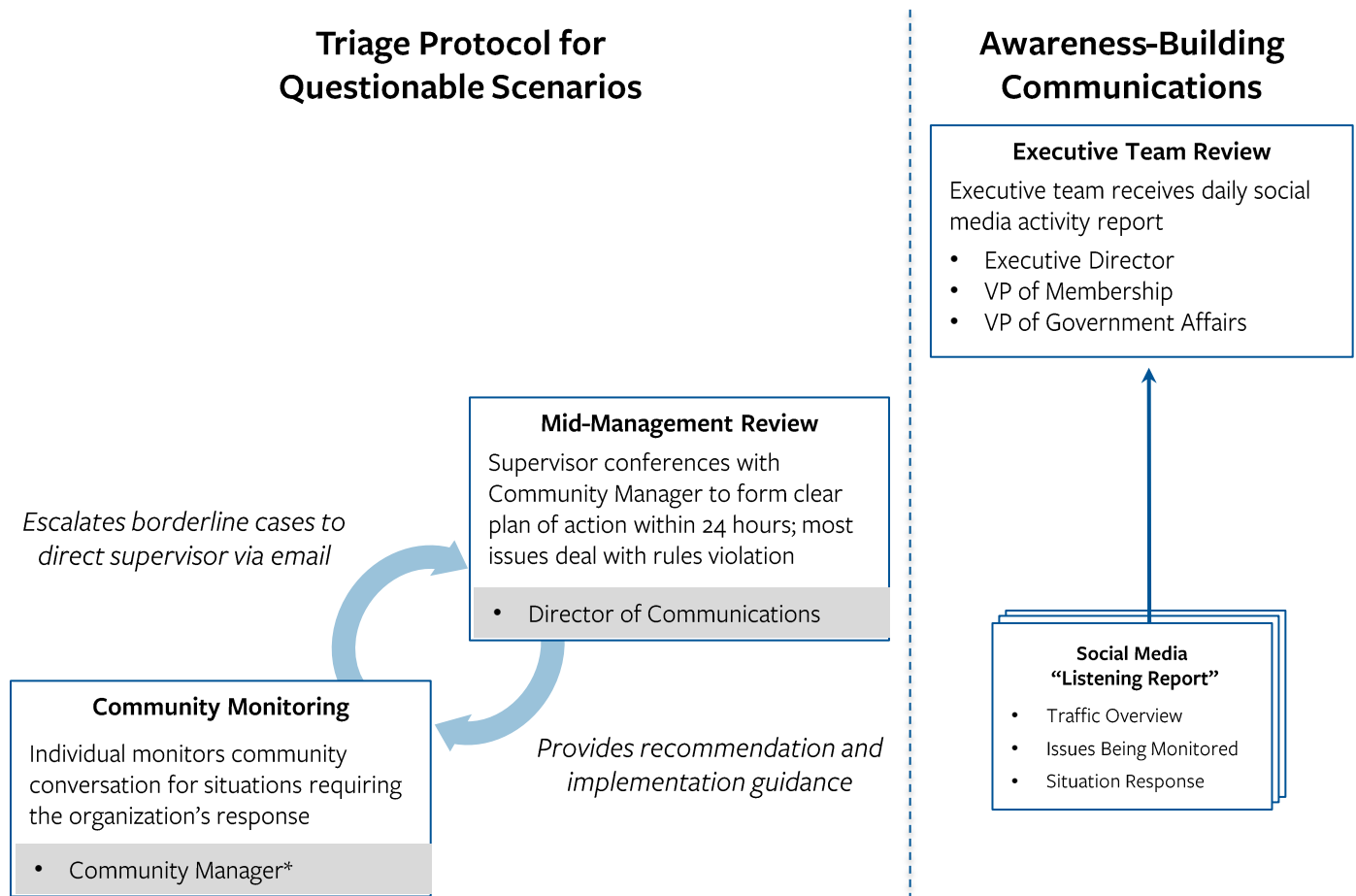
Source: American Society of Civil Engineers; SocialFish; National Journal Membership research interviews and analysis.

► **Conclusion #112**

Experience with a standardized process will gradually relieve senior-most staff from direct involvement without raising organizational risk; repetition of the escalation protocol breeds confidence in the ability of front line staff to successfully manage hazards of social media presence

Escalation Process Modified by Experience

Liberating Senior Attention Altogether



*Role denotes Social Media Specialist

Source: American Society of Civil Engineers; SocialFish; National Journal Membership research interviews and analysis.

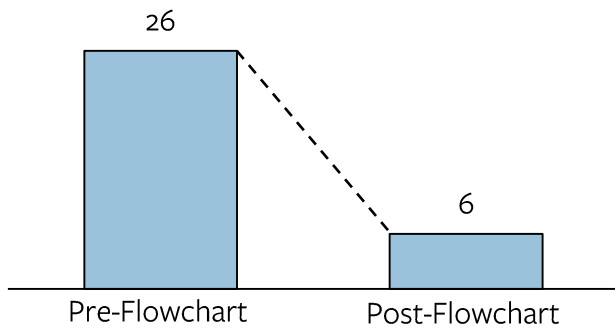
► **Conclusion #113**

Providing weekly “listening reports” to leadership accelerates senior staff withdrawal from day-to-day social media decisions; basic summaries of incidents and steps taken to resolve them are effective tools for keeping executives informed

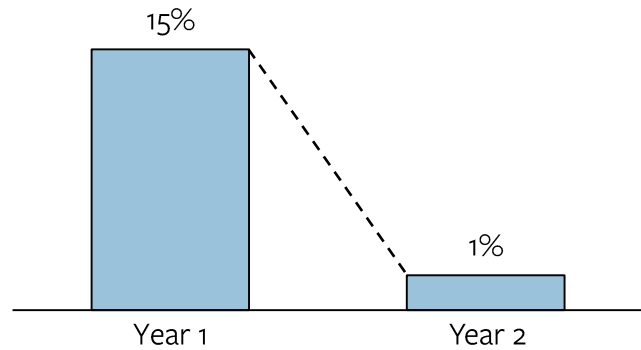
Dramatic Decline of Organizational Angst

Number of Issues Escalated to Senior Level Attention

Per Year



Percentage of Issues Escalated Since Formal Escalation Process Instituted



Under Control

“Things have relaxed a bit...We know it’s not appropriate for the organization to respond every time something questionable arises. And we have built an engaged community that helps to self-correct. It takes the pressure off and allows us to work on other member interests...We knew we had achieved a level of success when our Executive Director finally turned off his LinkedIn alerts.”

*Leikny Johnson
 Director of Web Content
 American Society of Civil Engineers (ASCE)*

▶ **Conclusion #114**

Additional Considerations: First, defense protocols should outline steps for interceding in any digital conversation that is trending in an undesired direction; limiting attention to conversations that involve overt criticism or conversations occurring only within the organization’s social network will result in overlooked liabilities

▶ **Conclusion #115**

Second, proactive posting of positions—for example, “seeding” social media discussions prior to the expected release of a competing interest group’s positions—can blunt opposition arguments; in many cases, pre-emptive posting results in a debate on substance before positions are taken by the public and traditional media

▶ **Conclusion #116**

Third, matching threat response to threat intensity is an essential discipline for social media managers; overreaction tends to open the door for even more damaging criticism, scrutiny, and unfavorable public exposure—from both those already engaged, and those yet to enter the fray

▶ **Conclusion #117**

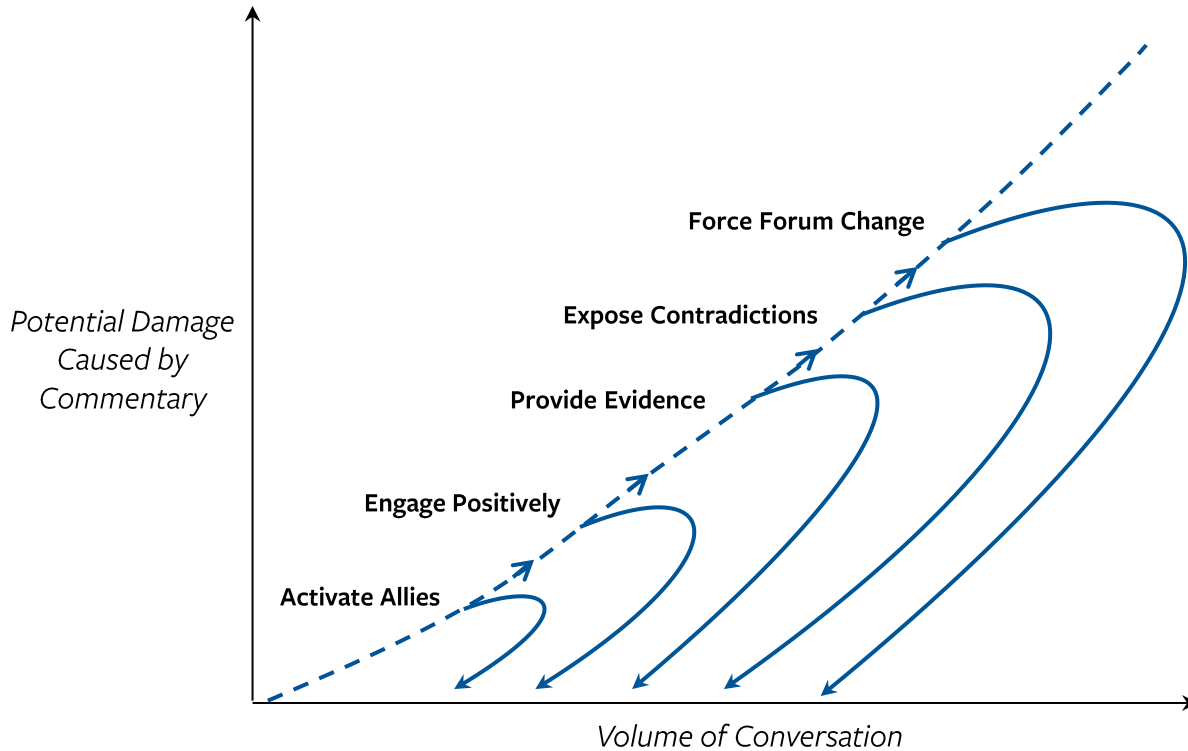
Almost universally, the best starting posture when attacked online is a positive and constructive tone; only after this posture has failed should the organization take more aggressive countermeasures

▶ **Conclusion #118**

Fourth, forcing a forum change (generally, from public to private) is always preferable to all-out combat over the web; publicly offering to resolve differences offline can effectively silence “trolls”—whether or not they accept the invitation

Neutralizing Negative Exposure

Strategies for Defusing Social Media Attacks Before They Combust



Activate Allies: Nudge friendly third parties to join the debate, back position



Engage Positively: Disarm opposition by commenting directly, positively, respectfully; use “human” tone



Provide Evidence: Inject third-party evidence to validate the organization’s viewpoint



Expose Contradictions: Highlight holes in arguments by politely referencing inconsistent past opinions



Force Forum Change: Publicly offer to resolve differences offline; those who resist are outed as “trolls”

Practice Assessment

Criticism Response Flowchart

Low → High

Time Commitment: ● ● ○ ○ ○

Implementation Difficulty: ● ● ○ ○ ○

Required Degree of GA Involvement: ● ● ○ ○ ○

Impact: ● ● ● ● ○

Overall Grade: A-

Recommended for virtually all organizations. Lack of senior leadership buy-in may present hurdles in some cases. Requires that executives become comfortable with letting the community serve as a principal defender of the organization’s brand—a philosophical shift that is difficult but ultimately necessary.

Practice #6: Stoplight Communications Protocol

Practice Description

Organization employs a social media protocol that clearly delineates types of employee-authored content deemed acceptable, unacceptable, or requiring special approval; coupled with intranet resources and internal communications that encourage sharing, staff are empowered to message on behalf of organization with limited risk and oversight

Situation

Organizations' social media engagement policies often provide little clarity on topics that employees are allowed to discuss over social media channels. As a consequence, employees' online communications about relevant issues and priorities are infrequent, and organizations thus miss large opportunities to leverage internal stakeholders—often fans who would gladly champion the cause—to amplify policy messages.

Action

Organization creates a simple staff social media policy, shared in self-explanatory “stoplight” format, that parses encouraged and discouraged forms of social media commentary in the organization's name. Criteria outlined in the policy help employees make judgment calls and clarify the right internal personnel to approach for permissions in ambiguous cases. Regular training and weekly pre-approved content for sharing help maximize the stoplight's utility.

Result

Policy allowed the social media team to simultaneously regulate and encourage employees' social media participation on behalf of the organization. Volume of on-target messages has increased as has the size of the audience for organization-approved content.

Laws of Social Media in Action

Community Contribution

Transparent Motivation

Anonymous Critique

Cocktail Etiquette

Crowd Arbitration

Collective Narrative

Short Distances

Quick Bursts

Conservation of (Personal) Energy

'Selfish' Sharing

► **Conclusion #119**

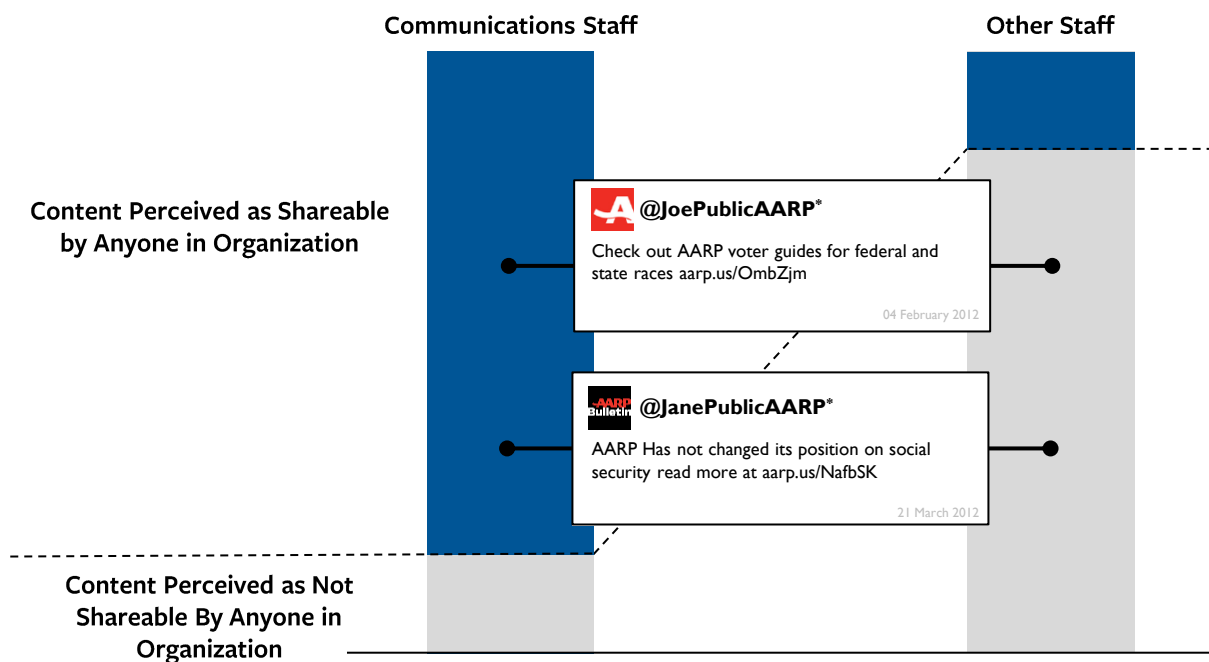
Policy executives often admit grave worry about their employees' personal use of social media; the prevailing concern: the possibility that employees will share sensitive information to the organization's detriment

► **Conclusion #120**

In reality, most employees are reluctant to use social media in a work context for fear of saying the wrong thing, and silence of employees in social spaces represents untapped "fan" potential more than it represents a mitigated organizational risk

What's Shareable?

Perceptions of Shareable Content*



“The challenge is in getting people to move past their fear of communicating online so that the organization can leverage its employee base and empower staff to advocate on the organization's behalf.”

Tammy Gordon
Director, Social Communications & Strategy
AARP

Case in Brief



Profiled Organization: AARP
Organization Type: Membership Association

Headquarters: Washington, DC

- Established social media guidelines to enable employees to communicate on behalf of AARP with limited senior-level oversight
- Outlines types of social media conversations that are acceptable, unacceptable, or requiring special approval

*Illustrative

Source: AARP; National Journal Membership Research interviews and analysis.

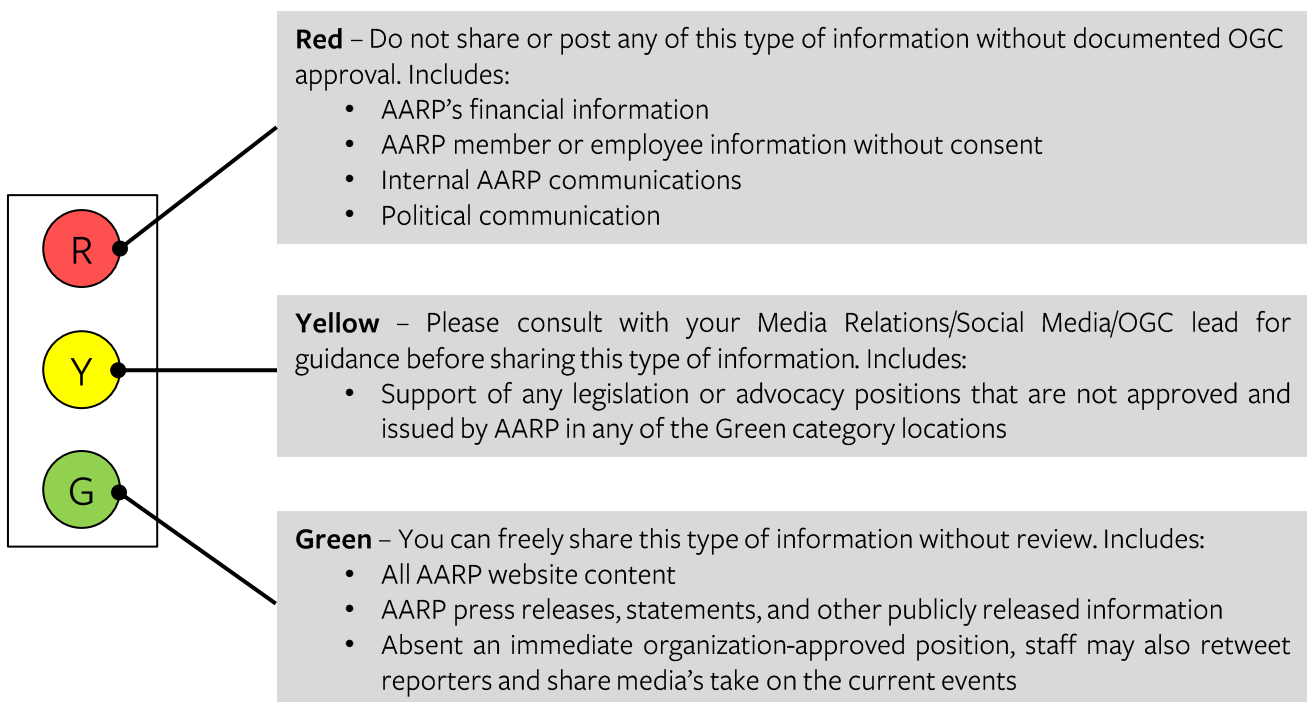
► Conclusion #121

A straightforward “stoplight” display can be a helpful tool for visually teaching which types of content employees are encouraged to share within their personal networks of influence; best models are easy to interpret, and facilitate staff involvement by giving clear examples of how to channel passion for organizational priorities

Laying the Foundation for Positive Employee Sharing

Organizationwide Policy Clarifies Approved Content

AARP’s Stoplight Communications Protocol for Staff



Note to Members

Social media guidelines are personnel policies and evolving National Labor Relations Bureau guidance around social media must be adhered to. Organizations creating social media policies should consult legal counsel.

► **Conclusion #122**

Rapid response teams can streamline the permissions process by providing an editorial evaluation of questionable social media content; dedicating a group to the task prevents employees from defaulting to silence on iffy content and increases volume of content that is approved for sharing at senior levels

► **Conclusion #123**

Response teams can also proactively author messages for general employees to copy and paste as they choose; spoon-feeding on-message content can drive marked increase in content sharing and message exposure

Getting to “Green”

Two Paths for Growing Pool of Shareable Content

Bottom-Up Approach

*On-the-Spot Guidance for Staff Inquiries**

From: Jane Public
To: Designated SM Contact

Can I tweet the following? “Call your local legislators and tell them how important it is to revise Medicare!”
Thanks, MG.



Designated Social Media Manager



- Serves as triage point for staff inquiries
- Adapts messaging by softening language and sourcing to AARP website
- Returns approved messaging to requesting staff member



Top-Down Approach

Establishing Position on Emerging, Buzzworthy Issues

Rapid Response Team



- Includes representatives from General Counsel, Media Relations, Social Media, and Government Affairs
- Anticipates staff questions on emerging issues
- Creates new, approved messaging
- Pushes out real-time issue update to all employees



@JanePublicAARP

Call your local legislators and tell them what Medicare means to you by visiting aarp.us/SkClta.

02 June 2012



@AARP

RT: Breaking news on Medicare revisions wapo.st/TiCx2n. More info on AARP’s position to come.

02 June 2012

*Hypothetical case for illustrative purposes only

Source: AARP; images from the Noun Project; National Journal Membership Research interviews and analysis.

► **Conclusion #124**

Easily accessible centralized resources expedite employee acceptance of encouraged roles

► **Conclusion #125**

Of Special Note: “Message of the day” campaigns are particularly effective for contextualizing organizational priorities within the news; such context provides employees with ideas for smart, topical content for social media discussions

Reinforcing Social Media Participation

AARP’s Online Platform

Message of the Day*

Internally promoted, shareable messages that reflect AARP news, views, and “asks” of the days. Includes real-time updates from rapid response team on previously yellow issue areas

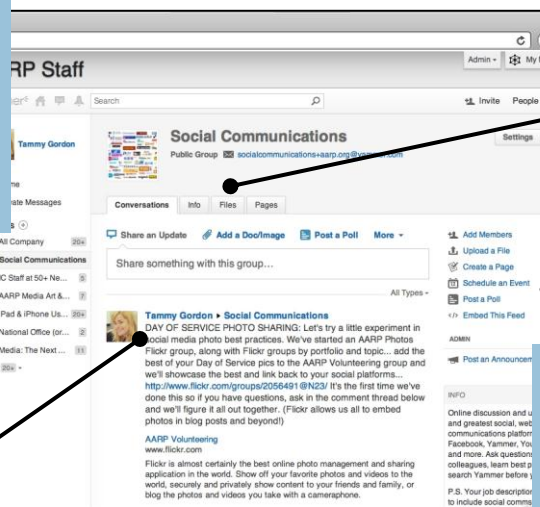


The @AARP #voterguide is out! Go to <http://aarp.us/Ocz87H> & enter your location for yours. RT to help us get the word out, would ya?

24 August 2012

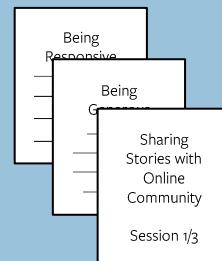
Repository of Evergreen Content

Source for shareable content creates opportunities for social media newcomers to speak online with confidence



Upcoming Training

Coaching for staff, state affiliates, and volunteers communicates permission to share and encourages online engagement



Best Practice Forum

Discussion forum for crowd-sourcing answers and sharing social media tips reduces demands on social media team

*Illustrative

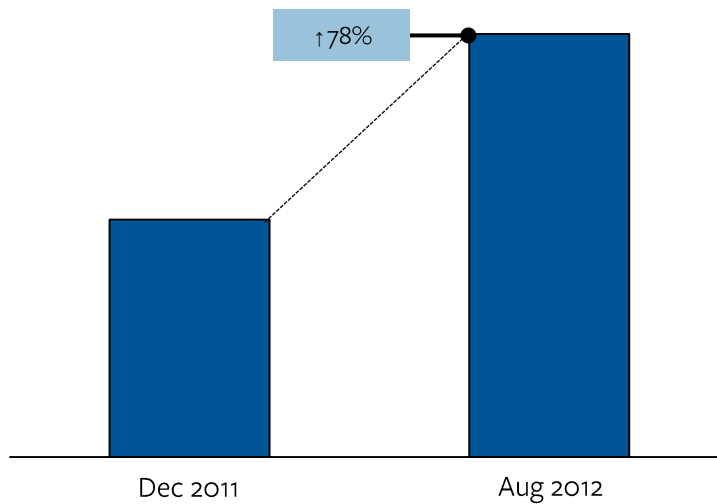
Source: AARP; National Journal Membership Research interviews and analysis.

► **Conclusion #126**

By empowering employees as ambassadors of the organization, spotlight protocols can effectively amplify organizational messages across a great many small, difficult-to-penetrate networks and trust-based communities

Super-Charged Organizational Reach *Employees Carry Message to Many New Communities*

Network Reach
As Measured in Volume of 2nd-Degree Followers¹



¹2nd-degree followers refers to followers of the organization's followers
Source: AARP; National Journal Membership Research interviews and analysis.

Practice Assessment

Stoplight Communications Protocol

Low → High

Time Commitment: ● ● ● ○ ○

Implementation Difficulty: ● ● ○ ○ ○

Required Degree of GA Involvement: ● ● ● ○ ○

Impact: ● ● ● ○ ○

Overall Grade: B+
Strongly recommended for most organizations, and especially for organizations with large communities of internal stakeholders/employees. Achieving desired level of social sharing among stakeholders requires strong working relationship between Government Affairs and Communications leaders, who must continuously develop, vet, and encourage use of approved content.

Chapter Three: Leveraging Supporters to Maximize Influence

This chapter explores approaches to building engaged communities and motivating meaningful stakeholder action—either online or offline—to advance a policy goal

Extending the Online and Offline Value of External Partners – Key Findings

▶ **Conclusion #127**

One of the most powerful uses of social media for an advocacy organization is building communities sympathetic to its cause; thoughtfully developed and nurtured, these communities can be activated on occasion to display their size and strength to policymakers

▶ **Conclusion #128**

When recruiting potential supporters, organizations should not try to compel certain types or degrees of participation; the social environment is not an effective medium for convincing individuals to do more than they originally intended, and participation on their own terms will encourage some individuals to lean in further over time

▶ **Conclusion #129**

The most effective tool to attract new recruits is emotionally compelling narrative from your existing community; stories volunteered by the community can be used not only to attract individuals to the cause but to encourage the entire community to act on the organization's behalf

▶ **Conclusion #130**

Valuable Side Benefit: The ease of capturing emotionally compelling narrative online for use in conversations offline is a highly underappreciated aspect of social media's value; the ability to bring positions to life in face-to-face settings has tremendous power

▶ **Conclusion #131**

For these reasons, advanced practitioners are engaging in deliberate strategies to solicit emotionally compelling narrative, capture it systematically, and leverage it through multiple online and offline channels; most important among these strategies: structuring solicitations for content, ensuing dialogue, and community reinforcement in such a way as to guarantee yield of relevant, high-quality narrative rather than idle chatter—or worse, a negative and defeating response from “outsiders”

▶ **Conclusion #132**

Once engaged, online supporters are typically quite willing to perform simple tasks on the organization's behalf that can prove highly effective; in sufficient volume, customized online petitions, virtual protests, and call-in campaigns remain as powerful as ever at signaling the size and strength of the organization's support

Practice #7: Tiered Engagement Menu

Organization introduces a wide variety of easy-to-fulfill engagement options for its community of supporters; low-intensity “asks” are designed to ensure that supporters at all levels of the engagement spectrum—not just the most impassioned—can be activated

Practice #8: Story-Centered Grasstops Recruitment

Organization identifies and engages unaffiliated—but impassioned and influential—individuals as grasstops advocates through story sharing; story-centric advocate recruitment and qualification processes vastly expand the pool of banner-carrying supporters

Practice #9: Aided Trending

Organization architects an online campaign process designed to generate and selectively amplify goal-advancing content while minimizing “background noise”; guided conversation clarifies district-level constituent interests and garners participant-generated content for use in discussions with policymakers

Practice #7: Tiered Engagement Menu

Practice Description

Organization introduces a wide variety of easy-to-fulfill engagement options for its community of supporters; low-intensity “asks” are designed to ensure that supporters at all levels of the engagement spectrum—not just the most impassioned—can be activated

Situation

Organizations frequently miss opportunities to attract passive and latent supporters. One common mistake is to promote a limited set of engagement options that appeal only to the most-invested advocates—specifically, time- and resource-intensive “asks.”

Action

Organization groups supporters into clusters—based on shared level of interest in the organization’s causes and capacity to contribute to the organization’s causes—and then analyzes the characteristics of individuals falling into those clusters. Using findings, the organization creates a broad range of engagement options, making sure that there are options that appeal to each cluster. The organization looks for specific ways to make involvement as easy as possible at every level of requested support.

Result

By adding to the list of engagement options, and by appropriately tiering calls to action based on community characteristics, the organization grew advocacy involvement from latent as well as active supporters.

Laws of Social Media in Action

- | | |
|---|---|
| <input type="checkbox"/> Community Contribution | <input checked="" type="checkbox"/> Collective Narrative |
| <input type="checkbox"/> Transparent Motivation | <input checked="" type="checkbox"/> Short Distances |
| <input type="checkbox"/> Anonymous Critique | <input checked="" type="checkbox"/> Quick Bursts |
| <input type="checkbox"/> Cocktail Etiquette | <input checked="" type="checkbox"/> Conservation of (Personal) Energy |
| <input type="checkbox"/> Crowd Arbitration | <input checked="" type="checkbox"/> ‘Selfish’ Sharing |

► **Conclusion #133**

Interests and abilities of individuals comprising the advocate pool are inconsistent

► **Conclusion #134**

Generic calls-to-action, therefore, generally underperform against opportunity; not all advocates are willing or able to contribute at a single, predefined level

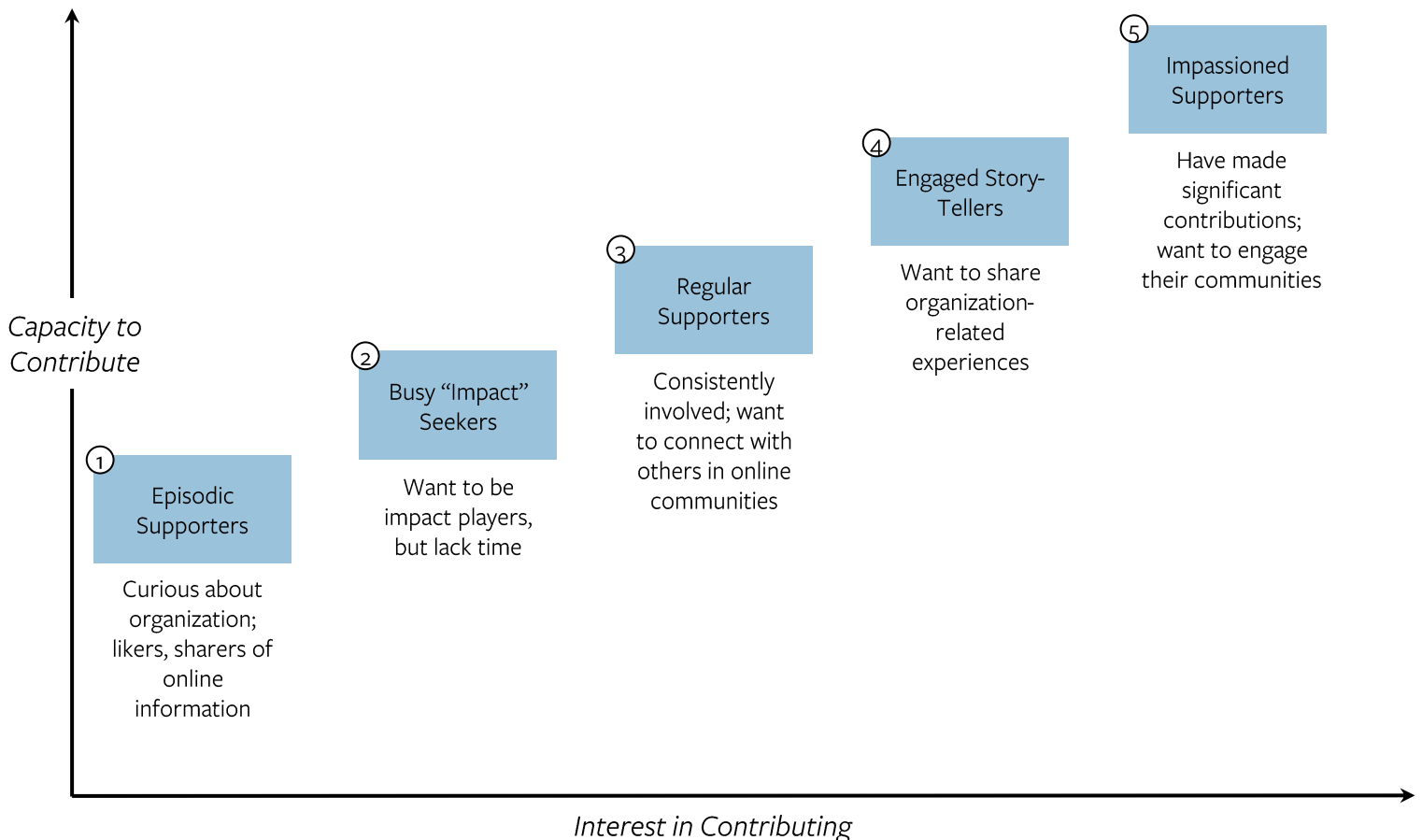
► **Conclusion #135**

Advanced organizations are considering ways to engage different groups of prospective advocates based on group characteristics; passion for the cause, frequency and size of past contributions are helpful metrics for defining groups

Understanding How Online Supporters “Cluster”

An Illustrative Example – Composite from the Research

Range of Interests and Investment Levels across Community

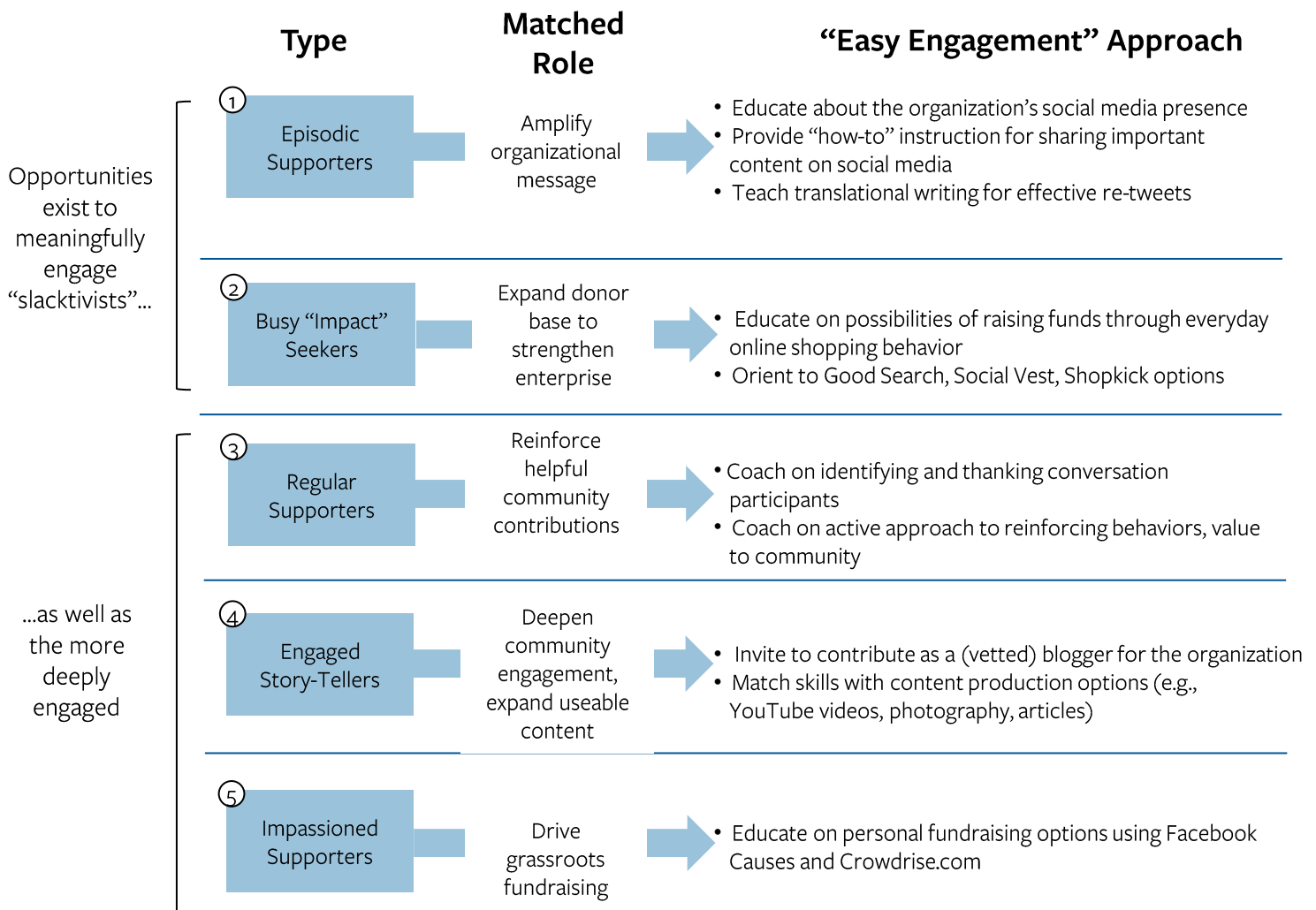


► **Conclusion #136**

Offering a variety of ways for advocates to get involved—specifically, ensuring there are options commensurate with each level of stakeholder interest—improves catchment; artful matching of advocate archetypes with profile-appropriate “asks” minimizes friction and maximizes the organization’s ability to leverage the energy of the community

Removing Barriers to Online Action

Meeting Advocates at Their Level



Implementation Tips—Encouraging Ongoing Stewardship

- ☑ Recognition: Publicly thank individual supporters as well as groups of supporters on social channels
- ☑ Information: Keep up-to-date material on how contributions are supporting the organization’s mission
- ☑ Support: Create sharable training materials for select advocate roles

► **Conclusion #137**

National Journal Membership Recommendation: Storefronts of the organization—the homepage, blog site, Facebook page, etc.—should prominently display menus of opt-in support activities; purpose: engaging prospective advocates as quickly as possible somewhere on the spectrum of opportunities

► **Conclusion #138**

Well-designed menus provide next steps for getting involved, not just lists of engagement opportunities; beginning a deeper relationship with advocates at their moment of interest accelerates the onboarding process and reduces unnecessary attrition from the pool of would-be supporters

Nudges, Not Hard Sells

Making It Easy to Assume Value-Added Roles

List of options are promoted in a variety of online locations, including website and blog



Easiest-ask engagement options appear higher on list; viewers can opt-in to value-added roles

Action facilitated through supportive "how-to" links and easy tips for getting started

► **Conclusion #139**

Caveat: Engagement options that involve digital advocacy must be designed to convincingly demonstrate the passion of the advocate community; policymakers, in particular, may discount interactions with individuals who are perceived as “slacktivists”—doing the bare minimum to voice an opinion—rather than committed activists

The Need for Proof Points

Policymakers Challenge Passive Advocacy

Representative Doubts about Social Media Campaigns

Congressional Chiefs of Staff

A “Slacktivist’s” Tool

“How do I know someone sending me a comment cares? They pushed a button—and maybe they were prompted to do so by an ad that promised a reward... Above all, though, with the rising use of instant form letter apps, I just don’t see the level of effort I’ve always seen from people who really care.”

A Shallow Pool

“So much of what I hear just has no thought behind it...‘Do this!’, ‘Don’t do that!’ Why? What’s your point? The brevity and incompleteness of thought we get so often from social media is not compelling. Honestly, if you don’t care enough to make a real argument, I don’t care enough to pay attention.”

With Whom Am I Speaking?

“So much of the information we receive in social just can’t be judged as genuine. Who’s writing? Why are they credible? Why do they matter to me? We can’t pay attention to anonymous comments. A doctor at a hospital in my district...I’m listening. Someone with no trace...I’m ignoring. We need to know where people are coming from, and when we do, we listen.”

► **Conclusion #140**

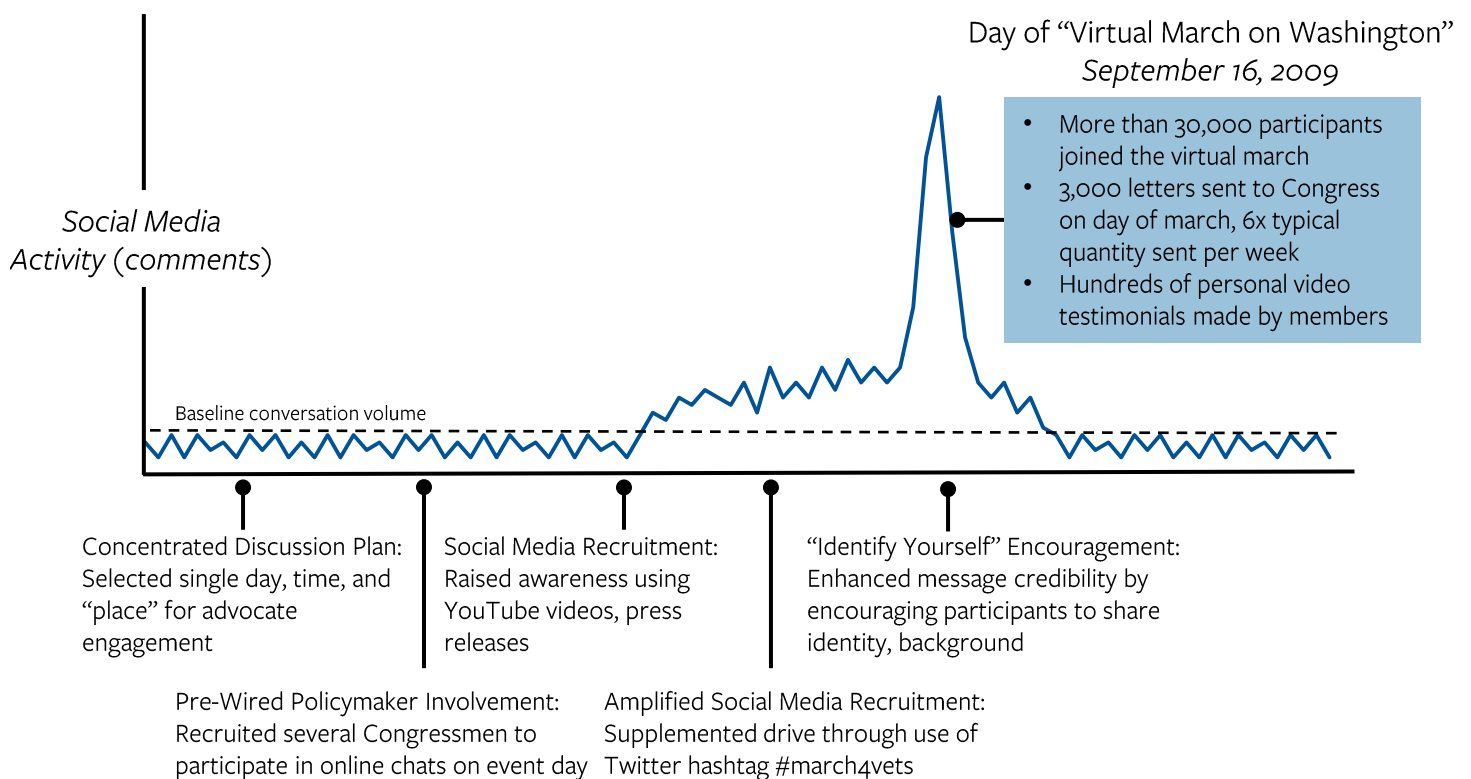
Organizing digital events that involve the simultaneous participation of many advocates is one way to demonstrate deep commitment to cause; the convergence of many individuals at a given time and (virtual) place signals dedication

► **Conclusion #141**

Additional Tip: Encouraging advocates to be genuine and transparent about their identities improves credibility beyond the time and effort taken to keep the appointment

Leaving No Room for Doubt Orchestrating a Virtual March on Washington

Facebook Activity around Disabled Veterans' Advocacy Event



Case in Brief



Profiled Organization: DAV
Organization Type: Association

Headquarters: Washington, DC

- Staged "Virtual March on Washington"—a single forum for its dispersed members to directly petition Congress for a revamp of the U.S. Department of Veterans Affairs' claims processing system
- Attracted more than 30,000 association members through pre-event recruitment efforts
- Collected over 3,000 advocacy messages directed to Congress

Practice Assessment

Tiered Engagement Menu

Low → High

Time Commitment: ● ● ● ○ ○

Implementation Difficulty: ● ● ○ ○ ○

Required Degree of GA Involvement: ● ● ● ○ ○

Impact: ● ● ● ○ ○

Overall Grade: B+

Strongly recommended for organizations with significant grassroots development goals and extreme diversity within the volunteer/advocate base. Upfront time commitment is extensive, but decreases once engagement options and support infrastructure are up and running.

Practice #8: Story-Centered Grasstops Recruitment

Practice Description

Organization identifies and engages unaffiliated—but impassioned and influential—individuals as grasstops advocates through story sharing; story-centric advocate recruitment and qualification processes vastly expand the pool of banner-carrying supporters

Situation

Organizations that regularly seek new grasstops advocates report facing several significant challenges: Reliance on the current base of known supporters largely limits the candidate pool to individuals who have opted into these roles in the past; and converting today’s passive supporters into tomorrow’s active supporters is both difficult and time-consuming. While there are efficient approaches to finding latent (not passive) supporters through new technologies, these approaches often are unknown or underappreciated.

Action

Organization uses social media profiles and targeted social media advertising to solicit personal stories from individuals who would likely connect with the organization’s cause at a values level. New connections are then vetted progressively (for efficiency) to identify a subset of individuals with the most impressive stories and greatest advocacy potential—those who are best positioned to strengthen the organization’s policy messaging.

Result

The redesigned advocate recruitment process yielded a large pool of new, high-impact grasstops leaders. Advocates cultivated through the new process respond to calls to action at extremely high rates and achieve greater impact both within their own communities and in motivating action on the Hill

Laws of Social Media in Action

- | | |
|--|---|
| <input checked="" type="checkbox"/> Community Contribution | <input type="checkbox"/> Collective Narrative |
| <input checked="" type="checkbox"/> Transparent Motivation | <input checked="" type="checkbox"/> Short Distances |
| <input type="checkbox"/> Anonymous Critique | <input type="checkbox"/> Quick Bursts |
| <input type="checkbox"/> Cocktail Etiquette | <input checked="" type="checkbox"/> Conservation of (Personal) Energy |
| <input type="checkbox"/> Crowd Arbitration | <input checked="" type="checkbox"/> ‘Selfish’ Sharing |

► **Conclusion #142**

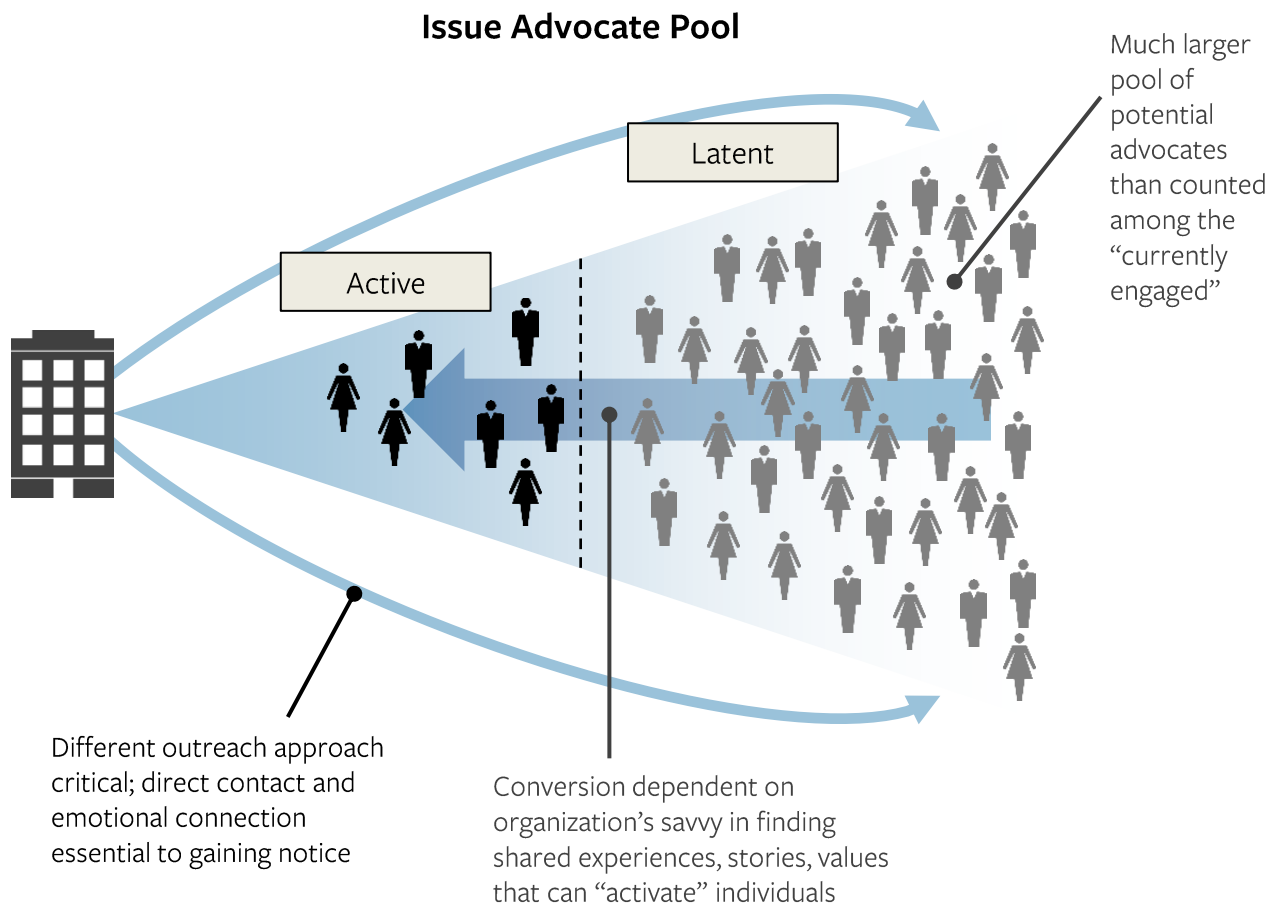
Today, building and engaging a cadre of grassroots advocates appears to be the most effective means of building momentum behind a staked legislative position; particularly in times of Washington gridlock, visible community leader support for an issue (and its assumed “network effect”) represents a powerful currency in Congress

► **Conclusion #143**

Finding and enlisting new grassroots advocates has been made easier, faster, and cheaper by social media tools; access to robust personal information in social channels presents immense opportunity for surfacing (and screening) new advocates for the cause, including “latent” supporters—individuals with innate attachment to the organization’s cause who have yet to be enlisted

Widening the Net for Grassroots Advocates

Focusing on High-Potential Individuals

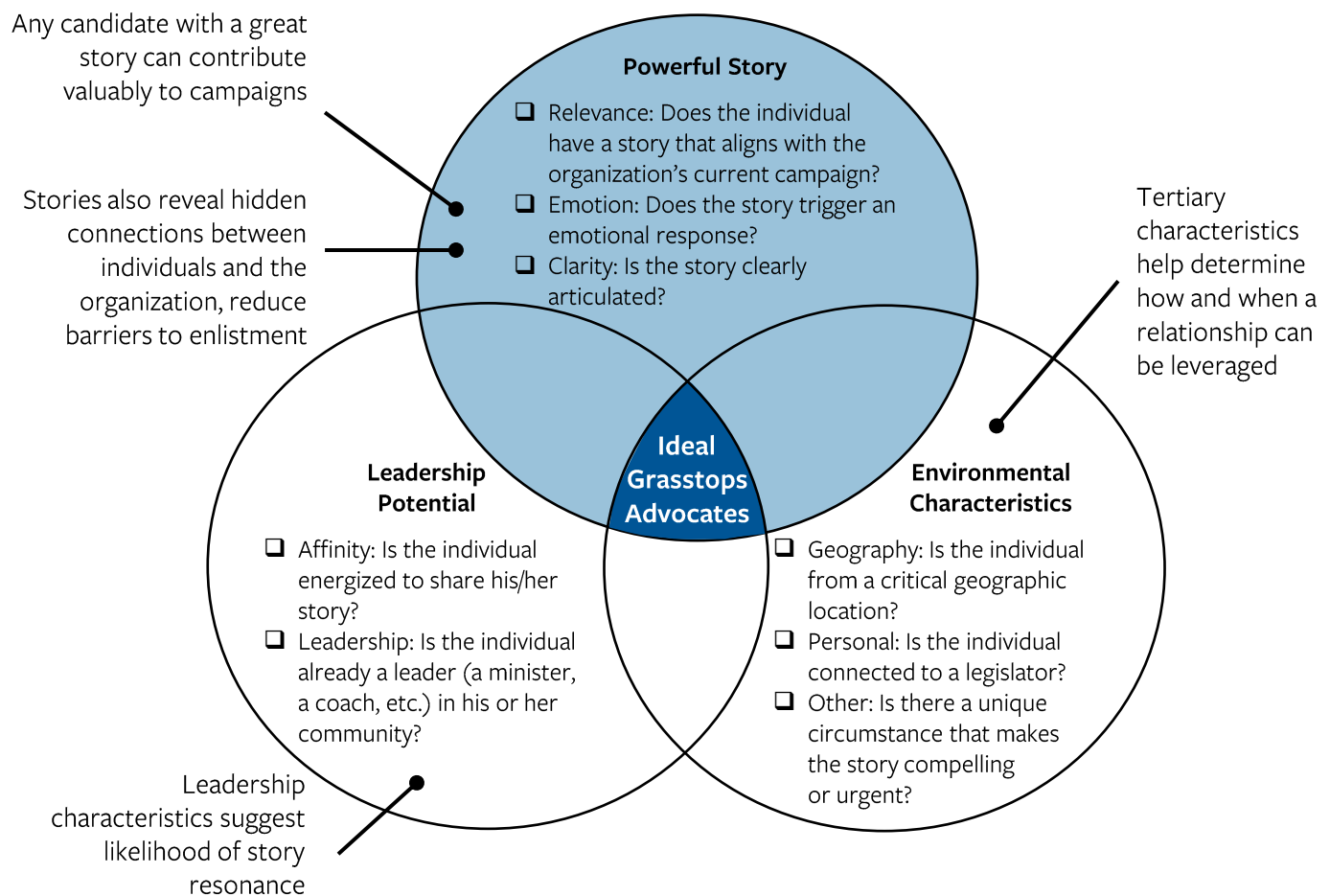


► **Conclusion #144**

When seeking or screening grasstops candidates online, the power of individuals’ personal stories should be valued above other measures of potential; use of these stories—which travel exceptionally well in digital media—in campaigns ultimately drives support for the policy agenda both outside Washington and on the Hill

Keeping the Story at the Core *Defining the Ideal Advocate*

Search Filter Guiding Candidate Evaluation



Case in Brief



Profiled Organization: Eli Lilly
Organization Type: Corporation

Headquarters: Indianapolis, IN

- Defines ideal grasstops advocates as individuals with exceptional (and goal-advancing) stories, even if the individuals are not currently involved in the organization’s work
- Builds mechanisms for identifying and engaging with advocates fitting pre-determined profile for highest-yield grasstops recruitment efforts; engagement is predicated on building a community, not simply a transactional relationship

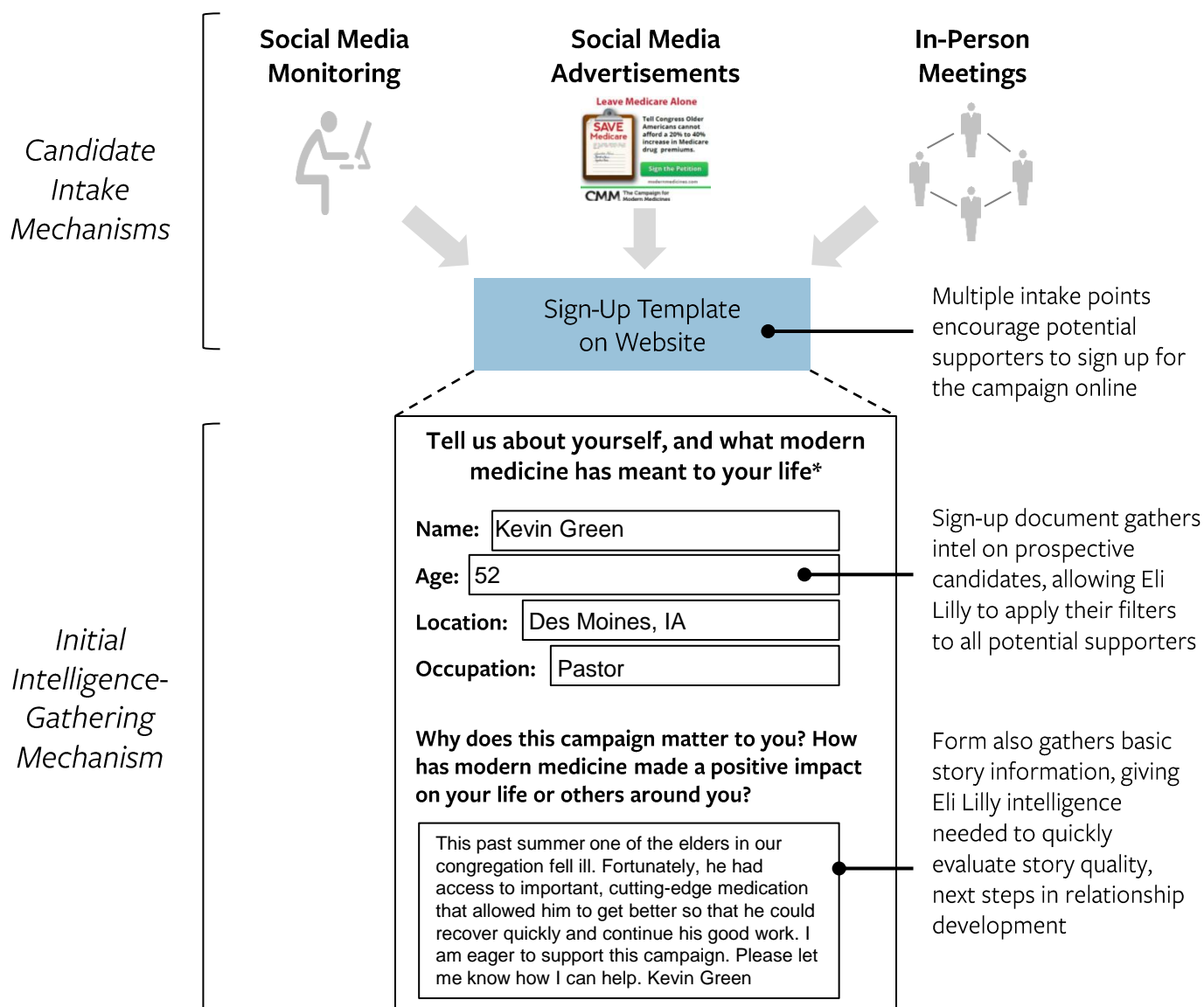
► **Conclusion #145**

Progressive advocacy organizations are therefore using social media first to seek and engage individuals who have emotionally resonant, contextually relevant stories; further winnowing of the candidate set based on other factors (leadership credentials, political connectedness, and so forth) can be completed as a second step

► **Conclusion #146**

Starting with the End in Mind: A mechanism for capturing and recording the stories of candidates identified through social media interaction should be established at the outset; particularly when soliciting stories in digital spaces, “share your story” forms that automate the archiving of individuals’ locations, roles in community, and ties to relevant policy positions offer substantial administrative benefits

Designing the Intake Mechanisms with Filters in Mind



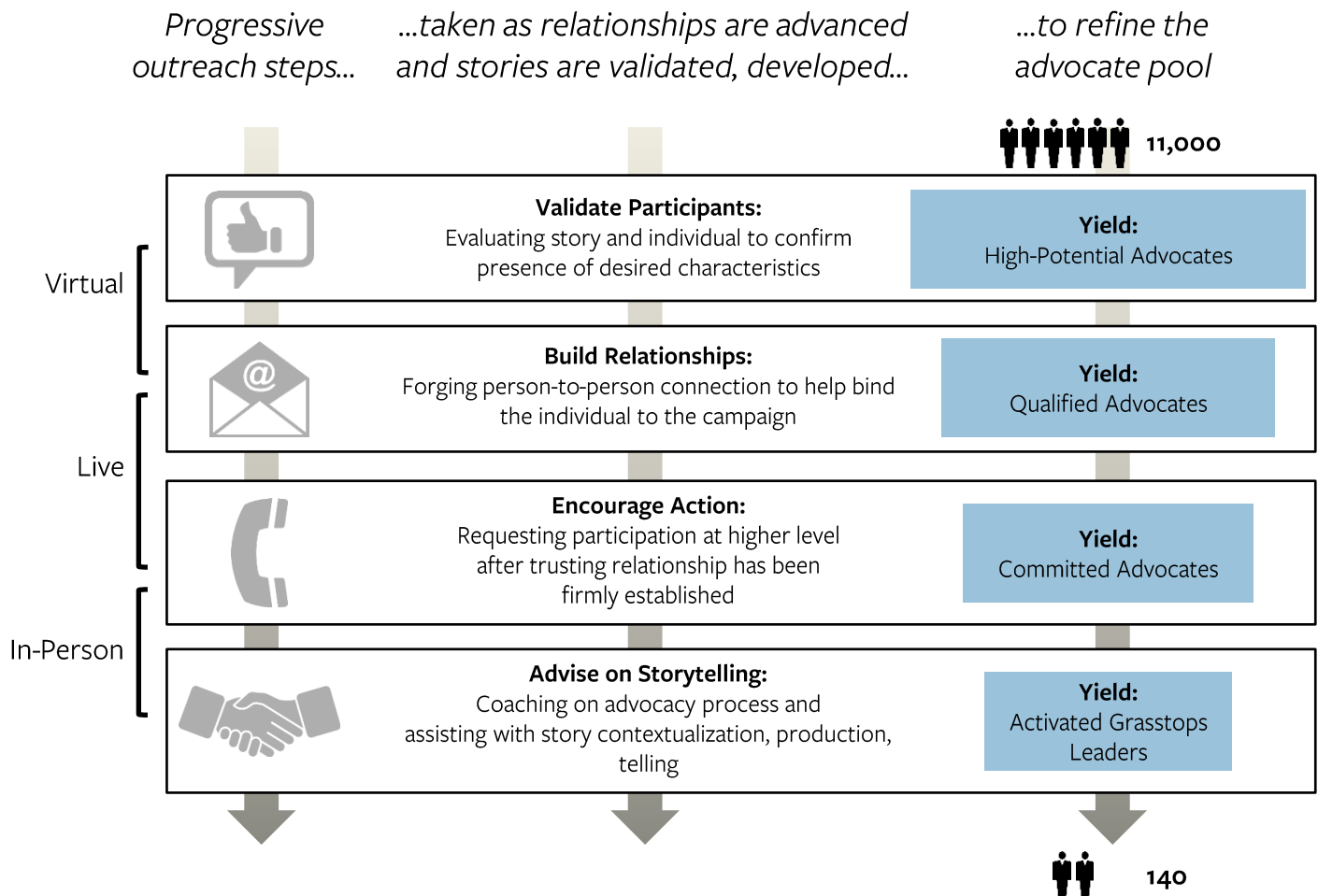
* Details and identity masked.

Source: Eli Lilly; images from the Noun Project.; National Journal Membership research and analysis.

- ▶ **Conclusion #147**
Though time-intensive, a robust candidate-vetting process is essential to preserving campaign integrity; any chance that campaign efforts could be derailed by an individual’s ulterior political agenda should be minimized
- ▶ **Conclusion #148**
A sequenced candidate relationship-building approach can be a cost-effective way to simultaneously validate candidate potential and build candidate interest in higher-impact, activist roles
- ▶ **Conclusion #149**
Direct recognition of a great personal story by an esteemed organization often is sufficient to bind would-be advocates to the organization’s initiative; early validation allows more time for coaching candidates in effective ambassador roles versus pitching them on more intensive levels of campaign participation

Exploring Relationship Potential

Candidate Vetting and Conversion Process



► **Conclusion #150**

Further Use of Collected Information: Geographic mapping of collected stories helps an advocacy organization identify discrete locales where its campaign lacks visibility or support; low-density areas on a map represent targets for more concentrated campaign work

Powerfully Illustrating Advocate Voice *Visualizing Legislation Support Geographically*

Geographic representation allows quick relay of critical information to internal and external stakeholders

For internal use, graphic helps identify potential gaps in coverage among supporters, informing “over-sampling” decisions

For external use, graphic exhibits volume of support and stories from particular Congressional districts—key items of interest to lawmakers

CMM The Campaign for Modern Medicines

Home About CMM Our Work Blog Take Action

Sign up for Email

MA [dropdown] [dropdown] Select State and District

WE CAN'T GET BY NOW ON OUR MEDICARE AND SOCIAL SECURITY DON NOT TAKE MORE FROM US.

JANNE P

DO NOT RAISE TAXES ON MEDICARE PART D.

THERESA O

Leave Medicare alone.

Elizabeth D

leave prescription drug benefits alone

Lori S

US index privacy policy | terms of use | contact us

The Campaign for Modern Medicines is sponsored by Eli Lilly and Company and comprised of advocacy organizations, businesses and professionals from across the country.

Lilly

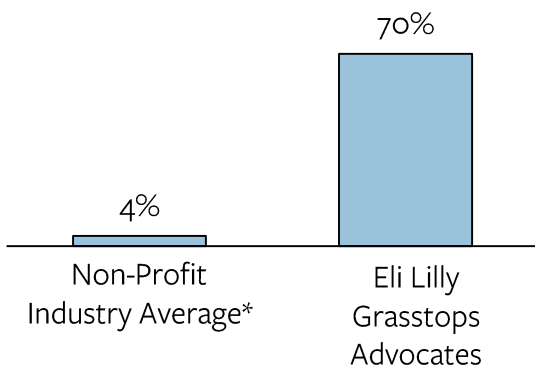
► **Conclusion #151**

Story maps and video displays also provide powerful testimonial artifacts for members of Congress during visits to the Hill; district-level views of community leader stories and campaign engagement can clarify for individual members of Congress both the volume and the intensity of support for a position from their own constituents

Advancing the Agenda

High Advocate Response Rates

Fans Responding to Call to Action



High-Value Advocate Contributions



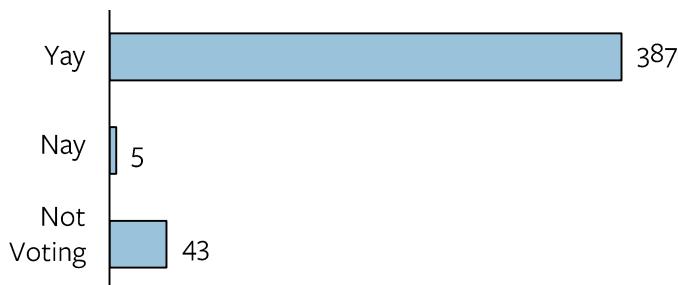
Tablet-friendly videos were created for use in meetings with members of Congress

70 Grasstops Advocate Videos Created

Desired Campaign Outcomes

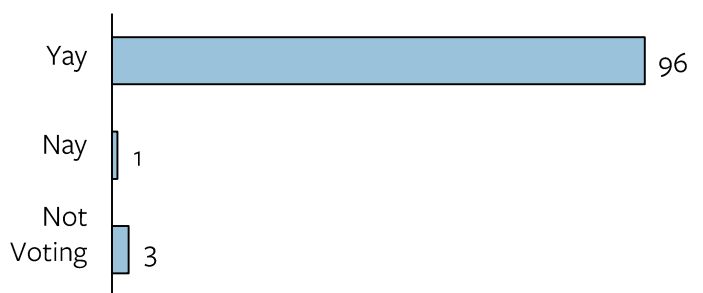
House Vote: H.R. 5651

Food and Drug Administration Reform Act of 2012



Senate Vote: S. 3187

Food and Drug Administration Safety and Innovation Act



“We couldn’t do what we are doing in advocacy if we didn’t have these social media tools to help us surface and empower a large pool of supporters.”

Amy O’Connor
 Director, Digital Government Affairs
 Eli Lilly

*Based on 2012 eNonprofit Benchmarking survey, e-mail advocacy response rates

Source: Eli Lilly; eNonprofit 2012 Benchmarking Survey, 2012; images from the Noun Project; National Journal Membership research and analysis.

Practice Assessment

Story-Centered Grasstops Recruitment

Low → High

Time Commitment: ● ● ● ● ○

Implementation Difficulty: ● ● ● ○ ○

Required Degree of GA Involvement: ● ● ● ● ○

Impact: ● ● ● ● ●

Overall Grade: A

Recommended for most organizations, but especially those with long-standing advocacy presence in Washington. Large upfront resource requirements—partially mitigated by pre-existing email lists and facility with social advertising—generally are matched by large impact of engaging outside-the-Beltway influentials in novel way.

Practice #9: Aided Trending

Practice Description

Organization architects an online campaign process designed to generate and selectively amplify goal-advancing content while minimizing “background noise”; guided conversation clarifies district-level constituent interests and garners participant-generated content for use in discussions with policymakers

Situation

Organizations hoping to solicit valuable community input for specific initiatives (such as campaigns) using social media have well-founded concerns about losing control of the message. Community feedback may illustrate inconsistencies about the level and intensity of support for a policy position, or at worst, generate content that runs directly counter to the organization’s policy purposes.

Action

Organization pre-authors “re-tweetables” related to campaign goals and shares content with key partners for subsequent distribution. Carefully crafted solicitations for crowd stories are then launched into a “prepped field” using a designated Twitter hashtag, and a social media team filters ensuing online conversation for community-generated content that reinforces the campaign’s policy goals. Goal-advancing, community-generated content is publicly spotlighted by the social media team to push conversation in the desired direction, stimulate helpful feedback, and encourage sharing of additional relevant stories.

Result

Carefully planned and managed conversation produced a high degree of engagement and a high volume of new, supportive content from stakeholders. Data and stories collected during the campaign were shared directly with policymakers to win an argument for legislative change.

Laws of Social Media in Action

- | | |
|--|---|
| <input type="checkbox"/> Community Contribution | <input checked="" type="checkbox"/> Collective Narrative |
| <input checked="" type="checkbox"/> Transparent Motivation | <input checked="" type="checkbox"/> Short Distances |
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| <input type="checkbox"/> Cocktail Etiquette | <input checked="" type="checkbox"/> Conservation of (Personal) Energy |
| <input type="checkbox"/> Crowd Arbitration | <input checked="" type="checkbox"/> ‘Selfish’ Sharing |

► **Conclusion #152**

Attempts to stimulate open conversation in social media can have disastrous consequences if not carefully managed; worse than straying off-topic, conversations can change direction and work against organizational goals

► **Conclusion #153**

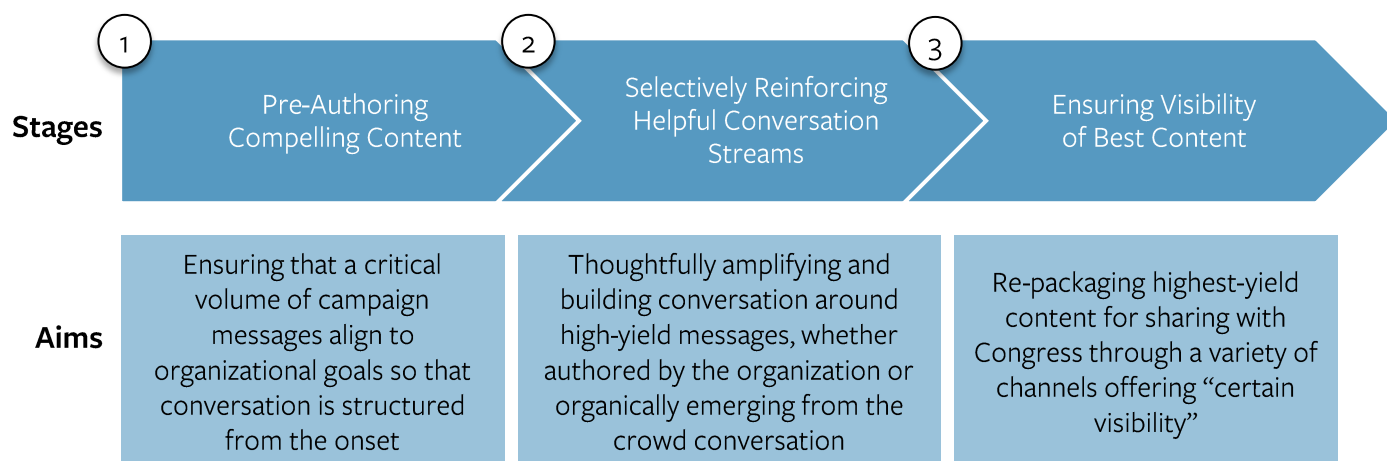
Fears of losing control over initiated social media conversations, however, are inflated; social media campaigns can be architected in such a way as to reduce the likelihood that control of the conversations will be seized by unfriendlies

► **Conclusion #154**

Three critical elements can, more often than not, deliver a satisfactory degree of control: pre-authored content designed for sharing by select advocates and allies; selective reinforcement of helpful conversation streams; and back-end effort to ensure visibility of best content among key audiences

Engineering a High-Yield Conversation

Key Aspects of Campaign Approach*



*The We Are Golf Coalition employed the Podesta Group for this campaign.

Case in Brief



Profiled Organization: We Are Golf/Podesta Group
Organization Type: Trade Association

Headquarters: Washington, DC

- Carefully engineers organizational messages and amplification of crowd-generated content to build a coherent, authentic, supportive body of campaign content
- Leverages instances of offline interaction to ensure visibility of critical campaign content

► **Conclusion #155**

Element 1: Pre-authored campaign messages that are compelling (e.g., reference data or use imagery), implicitly tied to campaign goals, and formatted for social sharing can set the tone for campaign-related social media discourse; such communications pique interest within the network, encourage sharing of the same (and similar) views, and make rousing disagreement much more awkward than if an open question had been asked

► **Conclusion #156**

Ensuring that influential stakeholders deploy relevant messages within their own networks also helps to amplify exposure and attachment to the campaign; strategic pairing of pre-authored messages with stakeholders based on their specific, niche interests helps to respectfully negotiate access to new communities

Creating High-Powered Campaign Messages



Pre-Campaign Diligence for Creating a Positive Sharing Environment

Based on the campaign's desired outcomes...

...thematic re-tweetable messages are pre-authored...

...and strategically paired with key stakeholders for sharing with their networks



Starting with goals ensures alignment of campaign messaging with desired outcomes

Using powerful data and consistent phrasing raises the likelihood that tweets are noticed and shared, building on-topic conversation

Assignment to stakeholders based on their networks' likely interests elevates relevance and resonance within and across groups

► **Conclusion #157**

Element 2: Consistent reinforcement of pre-authored content—both by the lead organization and by trusted partners—helps keep the conversation on-course for the duration of the campaign; a steady drum beat of messaging is critical to building high volume of relevant discussion, especially as new participants join the dialogue

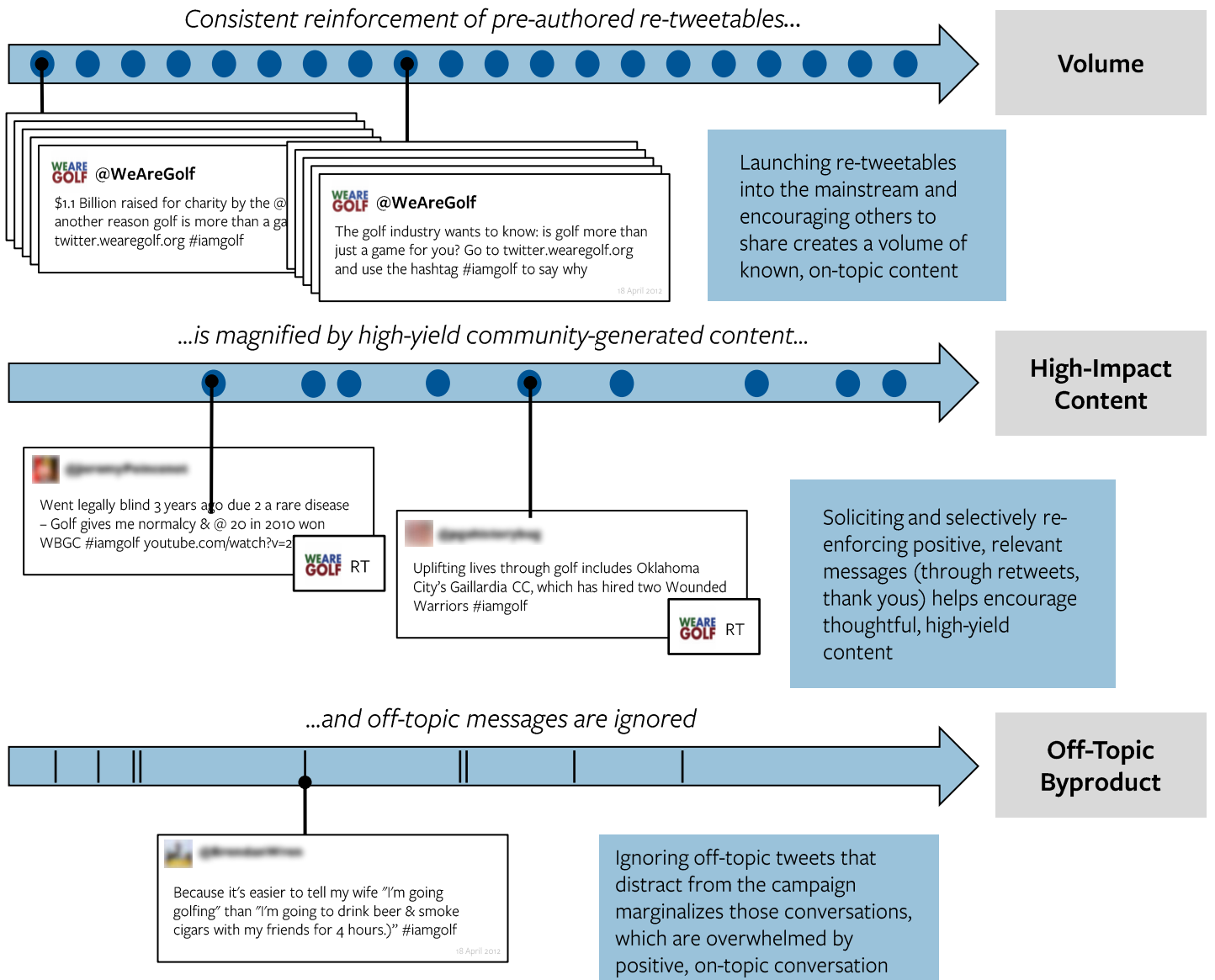
► **Conclusion #158**

A Related “Must”: Solicitation and selective reinforcement of organic community-generated content—including ideas, experiences, perspectives—adds depth and validity to the discussion; relevant, high-value content contributed by the community should be spotlighted to encourage further sharing, while off-topic or negative threads should be ignored

Selectively Amplifying Goal-Advancing Content

2

Discussion Management on Event Day



► **Conclusion #159**

The high volume of discussion to be actively managed by trustees requires a simple methodology for quickly deciding which new content to spotlight; key content attributes for consideration during the filtering process include content relevance, authenticity, and likely resonance with inside-the-Beltway influentials

Filtering Crowd Content for New Gems

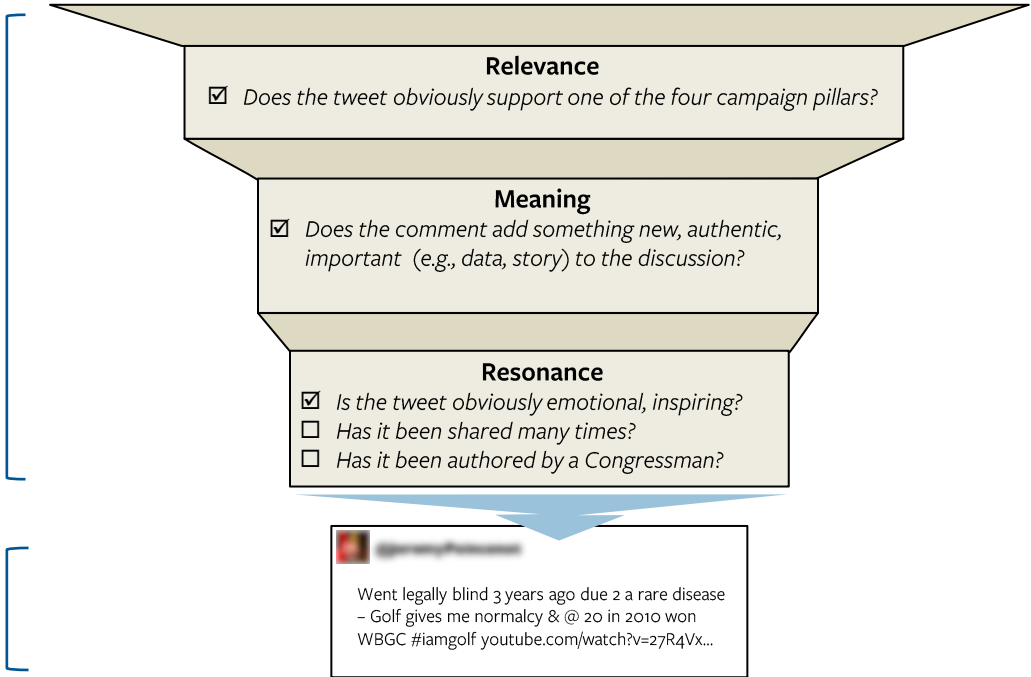


Process for Sifting and Amplifying New Content



Checklists allow quick parsing of content by campaign monitors...

...and selection of messages to “spotlight” in mainstream conversation



► **Conclusion #160**

Element 3: Using a diversity of promotional tactics ensures that organizational messaging, community-generated content, and data that demonstrates issue support reach the ultimate target audience; creative cross-platform sharing of results—using social media and traditional communications practices—offers greatest likelihood of visibility for Congress and Hill staff

Ensuring Visibility of Best Content

3

Reaching Key Hill Staff...

...when they go to lunch...

Twitter Board



Streaming volume of tweets displayed on a video board placed in the foyer of the Rayburn Building; board illustrated the volume of conversation around key issues from the day

...when they take a meeting...

Meetings



Hand-selected constituent tweets shared directly with members of Congress, showcasing the importance of golf within relevant districts

...when they search the Internet...

Website Posts



Tweets geographically organized and visually displayed on a map of the country, showing the broad appeal for the campaign (as well as especially strong appeal by location)

...when they check their messages

E-Mail



Legislator-specific tweets were e-mailed to staffers, alerting them to the volume and content of golf-supportive comments from their districts

► **Conclusion #161**

A choreographed campaign approach is especially valuable for highly specialized organizations seeking to join a fairly broad policy discussion; cohesive campaigns are possible despite the enlistment of new parties (and the communities they engage) using the model described across the previous pages

Achieving Message Coherency

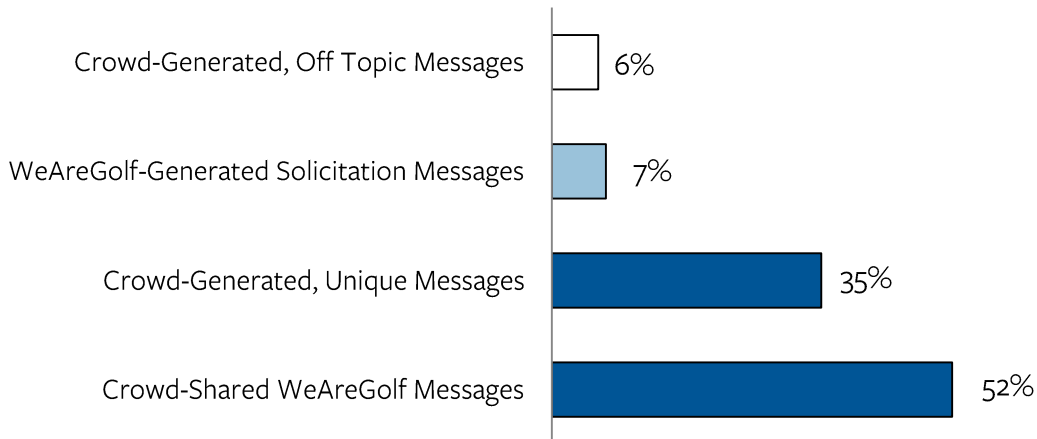
Reaping the Rewards of Organized Conversation

Broad Audience Reached

- Tweets reaching 5.8M Twitter accounts
- At its peak, #IAMGOLF seen by 50,000 Twitter users per hour
- 7 Congressmen tweeted a message

Desired Conversations the Most Resonant

*Percentage of Messages by Type**



*Excludes We Are Golf Retweets

Source: Podesta Group; National Journal Membership Research interviews and analysis.

Practice Assessment

Aided Trending

Low → High

Time Commitment: ● ● ● ● ○

Implementation Difficulty: ● ● ● ● ○

Required Degree of GA Involvement: ● ● ● ○ ○

Impact: ● ● ● ○ ○

Overall Grade: A-

Worthy of consideration for sophisticated social media users who manage high-stakes advocacy campaigns under tight timeframes. Requires considerable planning and choreography of social media messaging in the lead-up to a seminal campaign event. Can be derailed in instances where key partners—as in coalitions—are not tightly aligned.

