

# The Case for Professional Advocacy Software

Stronger engagement.

Faster response.

More powerful communication channels.

There are many reasons your organization may want to modernize your advocacy software.



If you are an advocacy professional, see if anything about this scenario sounds familiar.

Sarah works for an organization in the education sector. Her colleague covers the federal government, while Sarah handles state advocacy. Sarah loves her job, but it gets both overwhelming and frustrating—especially the email campaigns she has running in six states. She uses a free email program to manage the campaigns, and dumps data into a spreadsheet when she needs analytics. It's tedious, manual work.

More worrisome is that Sarah is having trouble increasing performance. Open and click rates are mediocre, and she is unable to raise them no matter what content she sends. She has trouble attracting new advocates, a necessity because her lists shrink with every blast. She made some forays on social media, but her organization is not setup well to capitalize on it. They lack in-house expertise and have no budget to hire.


Sarah worries she can't keep her audience engaged, get supporters to state rallies and—most vital—mobilize advocates to respond to a crisis when bills and regs are introduced.

Sarah is a pro working without professional technology. Purpose-built advocacy software would allow her to:

- Run campaigns and get the right analytics, all in one application (without manual work).
- Capitalize on social media to grow her lists.
- Send optimized communiques to increase performance by making it easy for advocates to respond.

Most importantly, it would move her program beyond email. Professional advocacy software would allow her to manage her supporters, identify those who are most active and give her new tools to mobilize them. She could take advantage of text messaging, for example, which has a 99 percent open rate and conversion rates as high as 25 percent.





If you are at all like Sarah, you are not alone. Many advocacy organizations are functioning on substandard technology, either using free tools, dated legacy systems or apps that don't deliver. There is a better way. It's called advocacy automation software and it can make a demonstrable improvement in your program's performance quickly.

There are many real-world cases showing the impact when professional skills are supported by the right systems:

- The Special Olympics used professional software to mobilize fast when the Trump administration announced its intention to cut \$18 million in federal funding. Their campaign delivered more than 44,000 emails, tweets and phone calls to lawmakers in 24 hours. The administration dropped the plan.
- The Consumer Technology Association supported the federal Over the Counter Hearing Aid Act. Their campaign compelled 1,313 new advocates in 49 states to take action, resulting in more than 3,000 emails to members of Congress. The bill passed.
- ACTwireless campaigned in favor of a broadband infrastructure bill in Hawaii. The organization got 540 new advocates to send 1,148 personalized messages to state lawmakers. The bill passed.

If you are an advocacy professional, there's a strong case that you should be using professional advocacy software.

# ADVOCACY SOFTWARE FOR ADVOCACY PROS

Sooner or later every organization confronts the need to buy modern, professional advocacy software. Professional advocacy demands professional tools. If you were in sales, there's a good chance you would use Salesforce. If you were in marketing, it might be Marketo or Hubspot. Grassroots advocacy specialists have their own professional software solutions. Phone2Action is a leader in this software category. There are also other providers.

Like Salesforce or Hubspot, advocacy software makes it easy for grassroots professionals to do the things they need to do every day. For example:

- Acquiring new advocates using social media and other channels
- Communicating with advocates using email
- Moving advocates to take action, such as contacting lawmakers
- Texting advocates for rapid response campaigns
- Managing stakeholders to get the most from your list
- Tracking advocacy and engagement activity to measure efficacy
- Optimizing advocacy campaigns to maximize impact
- Reporting to show the value of your advocacy program

Integrated advocacy software solutions like Phone2Action combine all of these functions in one place, and make it simple to perform essential advocacy tasks. That means your energy can be directed at strategy and optimization—in short, improving your program—rather than getting the next email out the door or crunching numbers to show your supervisor how the team is performing. Put simply, it's a matter of having the right tool for the job.

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## WHAT IS PROFESSIONAL ADVOCACY SOFTWARE?

Professional advocacy software is created to conduct political advocacy.

It is not marketing software. It is not legislative tracking software. It is not a rebranded email tool. Rather, it is software that is purpose-built to communicate with advocates, engage them to take action and connect them with decision makers via multiple channels.

The distinction is important because pro advocacy software has capabilities that other solutions don't, and these are not always obvious. For example, solid advocacy software is optimized to deliver email to Congress. It is also connected to federal agencies, where many organizations conduct grassroots campaigns to influence regulatory policy. The best advocacy software even supports local advocacy, because many organizations are regulated at the city and county level.

While there are many solutions available, smart organizations focus their search on solutions that are purpose-built for advocacy.

# WHY CONSIDER PROFESSIONAL ADVOCACY SOFTWARE?

Let's unpack that a bit. There are many reasons that professional software is a good choice for organizations that have a staff (even if that staff is small—or just one person) and are conducting advocacy regularly. Here are a few examples:

## New Capabilities

Modern advocacy software takes your program beyond email and gives you capabilities that are very hard to replicate with older systems or free tools. You may not need every single function right now. But using professional software ensures that the right tools will be available when you need them.



- **Text Messaging.** While email is the workhorse of the advocacy industry, it is getting tired. Open rates for most advocacy emails hover around 15 percent, with conversion at less than 2 percent. Text messaging, by contrast, has an open rate of 99 percent with conversion as high as 25 percent. The industry is discovering the value of text and eventually your organization will want to keep stride. The best professional advocacy software will have text capabilities as a native function, complete with the option to bring to market your own shortcode. It's important to work with a vendor that has a track record of successful and CTIA-compliant text messaging systems—because one unsolicited text could cost you \$500!



- **Advocate Acquisition.** Every program needs to grow. List quality goes down as people move, upgrade their jobs and change email accounts. If your list is not growing, it is likely shrinking. Professional advocacy software has optimized tools that make it easy to acquire new advocates using platforms such as Facebook or LinkedIn.



- **Stakeholder Management.** How well do you know your list? Do you know which of your advocates are most enthusiastic? Which are well connected? Professional advocacy software allows you to manage your advocates, create segmented lists and make the most of the people who support your organization.

*Modern advocacy software takes your program beyond email.*

## Optimization

Modern advocacy software is purpose-built to operate in today's grassroots environment. What does that mean? It means that advocacy automation software optimizes the functions that matter to your program, enhancing your impact without creating more work. Here are some examples:



- **Engagement.** Advocacy software maximizes engagement by reducing friction for advocates interacting with your organization. There are fewer forms, clicks and barriers. This streamlined experience makes it easier for advocates to do what you ask, whether that's signing a petition or calling a lawmaker.



- **Response.** Advocacy software makes it easier for you to create and launch campaigns, and to do so fast. A solid advocacy platform can enable you to launch a campaign in minutes, even if you don't have much experience. The app is intuitive and easy to manage, taking the effort out of rapid response.



- **Simplicity.** Advocacy software fits well in your environment because it was built to do so. Everything is responsive, meaning advocates can transact on a phone or tablet. And communicating with advocates through email, text or social media is simple.

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## Modern Program Management

Professional advocacy software simplifies managing your program, whether you are a one-person show or running a large, cross-functional team. Here is what you can expect:

- **Efficiency.** Professional advocacy software puts all of your tools in one place, making it easier to complete common tasks. That allows your team to focus on strategy, tactics, messaging and other elements that make a successful advocacy program.
- **Analytics.** Professional advocacy software delivers the metrics you need to fine tune campaigns and report progress, and it does it from day one—without spending a lot of time crunching data.
- **Ease of Use.** The best advocacy software is intuitive, minimizing the time it takes to adopt the new system and making it easier to train staff on how to use it. That means it can bring value to more than one team or department.
- **Simple Integration.** Good advocacy software integrates with or augments your existing technology stack easily. If your organization tracks its data in Salesforce, for example, your advocacy software should have an app on the Salesforce AppExchange. There's a big difference between an integration that is championed and featured by a provider like Salesforce and a custom integration that hasn't been battle-tested. Make sure you select an advocacy vendor that has been through the requisite security approvals for a platform sponsored by a public company like Salesforce or Blackbaud. Small configuration or integration matters are to be expected. But it should not take months of custom work.
- **Deliverability.** This is an item rarely discussed, but it is extremely important. Professional advocacy software is optimized to deliver messages to Congress and federal, state, and local regulators. Even the best campaign will fall flat if communications do not reach their intended targets. Pro software ensures that they do, and the provider should be able to explain how they handle exception management, and give you insight into details, like which states have webforms, and which use email addresses.
- **Support.** Serious advocacy software offers 24/7 support. Not just a knowledge base and a form, but the ability to get a human on the phone who can solve your problem *now*.

## SHOW YOUR VALUE

Advocacy automation software makes it easier to show the value of your program. And that can be powerful stuff.

Advocacy pros know all too well that it is difficult to show ROI on an investment in advocacy. Likes and shares are thin compensation when the cost of the program is paid in dollars. Programs get defunded all the time.

Professional software is designed to track engagement and conversion, giving you precise information to report to your leadership. Effective advocacy can always be quantified. Professional software makes it simple, without crunching data, so you can report your successes more often.

# THE INVESTMENT IN PROFESSIONAL SOFTWARE

Of course, few good things come for free. Professional advocacy software is no different. For organizations that are serious about upgrading their technology, there are costs in both money and time. Here is what you can expect:

- **Budget.** Advocacy software will require an investment, that usually scales with the size of your audience. Very capable solutions are available for less than it costs to hire a few summer interns. Of course, it is very possible to spend more. Pricey custom solutions can run to six figures. It pays to set a realistic budget and then evaluate solutions that fit your needs.
- **Training.** It takes time to learn a new system. Make sure the software you choose is intuitive and that the vendor provides training, materials and support to get your staff up to speed. Budget time to get your team trained and comfortable with the new tools. If you need to pay for each customer support call or training session, you aren't getting the right value for your investment.
- **Transition.** You will need to move your assets into the new system, including lists, images, logos, written content and anything else your program requires to conduct its campaigns. The right software provider will make this easy, with simple tools, technical support or both.

*Advocacy software can provide your organization with a substantial return, usually very quickly.*





# THE PROFESSIONAL SOFTWARE ROI

Advocacy software can provide your organization with a substantial return, usually very quickly. It is not unreasonable to expect at least a moderate bounce in important metrics, provided you buy the right system for your needs, have it implemented correctly and invest in adequate training. Here is what you might expect:



- **Increased Engagement.** Because advocacy automation software is optimized, organizations often see a bounce in engagement-related metrics. Campaigns become more effective because the software delivering them is making it easier for people to interact. Lyft, for example, saw a 28 percent conversion rate on a campaign against a ridesharing bill in California, 14 times the industry average.



- **Increased Audience.** The best advocacy systems come with tools to grow audience. This makes it easy to launch—and maintain—campaigns designed to increase the number of advocates on your list. These can have a major impact in a short amount of time. When the National Humanities Alliance launched a campaign to save the National Endowment for the Humanities from federal cuts, it mobilized 35,000 advocates to take action. Eighty percent of them were new.



- **Increased capabilities.** From the ability to use text messaging to stakeholder management tools, solid advocacy software will allow you to do more than you do now, and to do it all more easily.

There is another element of ROI that is less easy to quantify: keeping your capabilities and your staff current. Put another way, professional software eliminates the high, and often hidden, cost of falling behind.

*Professional software eliminates the high, and often hidden, cost of falling behind.*

# TAKING YOUR FIRST STEPS

Of course, as with any technology purchase, there are risks. Too many purchases are poorly researched, not thought out or made to fill needs in the moment without long-term planning. Many more are poorly executed, with little thought to training or implementation. To avoid these potentially costly mistakes, here are some steps you can take:

## TAKE A DEMO

Getting a live demonstration of a software system will give you a strong sense of what is offered, how it operates, what kind of training is required and how your organization might transition. When you take a demo, bring your director of advocacy, social media manager or another colleague involved in advocacy. Each of you are likely to notice different elements.

## DEFINE SUCCESS

Have some conversations in your building to define what success means. Make the connection between the acquisition of professional software and increased ROI for your team or department, and how that success contributes to the organization as a whole.

## PRESENT CASE STUDIES

Present case studies to your team and your leadership that show how similar organizations achieved success in their advocacy efforts using professional advocacy software. Good software providers will have these case studies in abundance and should provide them to you.



*Want to learn more about the advantages of professional advocacy software? Phone2Action's team has decades of experience and we're here to help. Call us for a free consultation: (202) 888-7439*