THE 11-POINT GUIDE
TO GET STARTED WITH DIGITAL TOOLS

Ensure there is internal alignment on the use of digital tools. Getting people on the same page in understanding the power of and specific ways the tools should be used by your organization means that management will understand how to best support their use across the organization.

Identify your current organizational goals and the strategies for meeting them. Digital tools are most useful when they are deployed to help you do what you are already doing. They and the people who use them **should not be siloed** from the rest of the organization. **Clarity on goals and strategies gives you a plan for implementing your digital strategy.**

Once you have your goals, choose platforms that will give you the best match between them, your audience/constituency, and your theory of change. For instance, if you plan to use digital tools to galvanize actions beyond sharing posts, then pick Facebook over Twitter. If you plan to reach young people using narratives, choose TikTok or Instagram Stories. If you want to set a narrative or be a thought leader, **choose Twitter**.

Always get off-platform contact information for your supporters/audience/constituency. Remember: the platforms control the algorithm, determining who sees your content and when. **Offer action-taking opportunities** using web-based petitions and forms to capture email addresses, mobile numbers, and home addresses, which allows you to use tools that aren't mediated by Big Tech.

Don't let content creation intimidate you. First, you don't have to do it all. Many platforms reward curating content alongside content creation. **Second, using free tools like Canva and stock photos can make creating posts very easy and low-cost.** Third, if you are seeking action-taking, then the urgency of the issue or ask is often the most galvanizing factor, not the overall quality of your images.

Use metrics that matter to the success of your goals. Re-orient your metrics and key performance indicators towards campaign goals and wider power-building strategies rather than vanity metrics like reactions, likes, or followers. If you are seeking people, then set your metrics around converting people to your email list or turnout via events pages. If you are seeking stories, set your metrics around stories shared or conversations generated.

Powerful digital strategy augments your entire campaign or organizing cycle. There are digital tools that align with each aspect of your campaign or organizing process. Social media optimized for conversions via web-based forms helps your base-building. Digital communities built through Facebook or Google Groups support leadership development, engagement, and absorption. Email, Facebook, and texting are excellent for mobilization. Email and texting are great tools for follow-up.

Consider using digital tools to build connections and community among your activists/ supporters, especially if you value getting online supporters to take in-person action. Providing digital spaces for your supporters to connect and find mutual support fosters trust, helps enforce social norms, which builds identity and efficacy. It's a key ingredient for successful online-to-offline organizing.

Use your digital tools to augment turnout for your in-person events and meetings. For example, "Why I'm acting" videos help enforce the social norm of taking action, which promotes turnout, while providing information on event logistics promotes self-efficacy and reduces flake rates among your confirmed attendees.

Email is not dead. Email is still the most flexible and most versatile digital tool available, and you almost never have to worry about the email company interfering with your ability to reach your supporters. Make sure you have a bulk email tool, preferably one that links to your Constituent/Customer Relationship Manager (CRM), in your digital advocacy toolkit.

When you can, invest in a CRM tool. CRM is another word for database and having one that you can use and that allows you to know what actions your supporters are taking or how they are interacting with you on social media will enable you to talk to the right person at the right time about the right thing. Examples include EveryAction, Salsa Engage, Salesforce, and HubSpot.

Get acquainted with data management. Digital enables the tracking of a daunting amount of information and some CRMs will take it all in. But turning it into good lists or background for useful conversations means creating systems to categorize it all and systems for keeping it as clean as possible.