The Social Pulpit
Barack Obama's Social Media Toolkit

Barack Obama won the presidency in a landslide victory (by a margin of nearly 200 electoral votes and 8.5 million popular votes) by converting everyday people into engaged and empowered volunteers, donors and advocates through social networks, e-mail advocacy, text messaging and online video. The campaign's proclivity to online advocacy is a major reason for his victory.

Since the election, the social media programs adopted by Obama's transition team have foreshadowed significant changes in how Obama, as president, will communicate with - and more importantly - *through* the mass of supporters who were collected, cultivated and channeled during the campaign. **Obama wants to be the first president to govern with BlackBerry in hand; he will certainly be the first with a legion of 13 million advocates at his fingertips.**

Changing the Way Businesses Communicate

Obama has already succeeded in changing the way strategists think about engineering electoral victory. But, the lessons learned from his campaign won't just be applied to future elections. Nor will they be limited to governing how the president relates to the American people. By combining social media and micro-targeting in the manner that it did, the campaign revealed force multipliers that are already being adopted by advocacy groups pushing their own issue agendas.

Smart businesses will embrace this public engagement model as well, particularly in how they ladder engagement among natural allies such as customers, employees, retirees and suppliers. Otherwise, businesses will be at a significant tactical and strategic disadvantage when their critics and competitors create a groundswell of their own.

By examining the social media success of Obama's campaign and understanding the ways that advocacy groups are incorporating these lessons into their own engagement programs, businesses can learn what is required to remain relevant in this new environment by retooling their communications efforts to successfully leverage social media.

**Social media lessons
from the Obama campaign**

- Start early
- Build to scale
- Innovate where necessary; do everything else incrementally better
- Make it easy to find, forward and act
- Pick where you want to play
- Channel online enthusiasm into specific, targeted activities that further the campaign's goals
- Integrate online advocacy into every element of the campaign

Candidate Obama's Social Media Success

Obama was not the first presidential candidate to raise a million dollars online (McCain '00),[1] nor was he the first to use Internet grassroots efforts to mobilize online supporters to MeetUp in their local communities (Dean '04). However, McCain failed to convert his online donors into votes and Dean failed to channel the online fervor into effective ground support. Obama was the first to do both, by weaving technology and the Internet into the fabric of his campaign. He understood that the value social media could bring to the campaign grew exponentially if online advocacy was elevated to the campaign's highest levels and integrated into all elements of the organization.

The Obama campaign combined the embrace of online enthusiasm of Dean '04 with the discipline, organization and hyper-targeting of the Bush '04 re-election campaign. Obama's campaign started early, was built to scale, brought in the right team and struck a difficult balance between inspiring the kinetic energy of a movement and channeling the enthusiasm into the precise activities that are needed to win a campaign – donations, organization and getting out the vote – in the specific neighborhoods, districts and states that the campaign needed to win.

Although the Obama campaign was revolutionary in some respects, it ultimately used the same tools that many campaigns had previously employed. However, the campaign did everything incrementally better than its competitors, including how it identified, prioritized and tracked prospective voters all the way to the polls using the campaign's Houdini database. It used the data to drive strategic decisions down to granular detail - for every voter, every e-mail, every dollar and every vote that was needed to win.[2]

The Obama campaign leveraged all the tools of social media to give ordinary Americans access to resources usually reserved for professional campaign operatives. Compared with both his Democratic primary challengers and the McCain campaign, his operation was cycles ahead.

Formula for Electoral Victory

In addition to Obama's 13 million member e-mail list and the three million mobile and SMS subscribers – tools that the McCain campaign failed to effectively utilize – the Obama campaign also built advantages in Web site traffic, YouTube viewers and social networking friends through a better coordinated effort and a 10-to-1 advantage in online staff.

Obama vs. McCain				
2x	4x	5x	10x	365 electoral votes
Web site traffic	YouTube viewers	Facebook friends	Online staff	66.8 million popular votes

The President's Social Pulpit

The story of how Obama will use social media from the White House is yet to be told. In many respects, the rules are still being written, or will soon be re-written. However, Obama is already converting the President's bully pulpit into a *social pulpit*, delivering a message that is designed to be taken up and spread by others, with the tools and techniques learned during his campaign. Instead of relying on the traditional one-way, top-down approach to communications, the incoming administration is harnessing the power of public engagement to influence the conversation across various spheres of cross-influence.

Public Engagement Model
Spheres of Cross-Influence

Source: Edelman
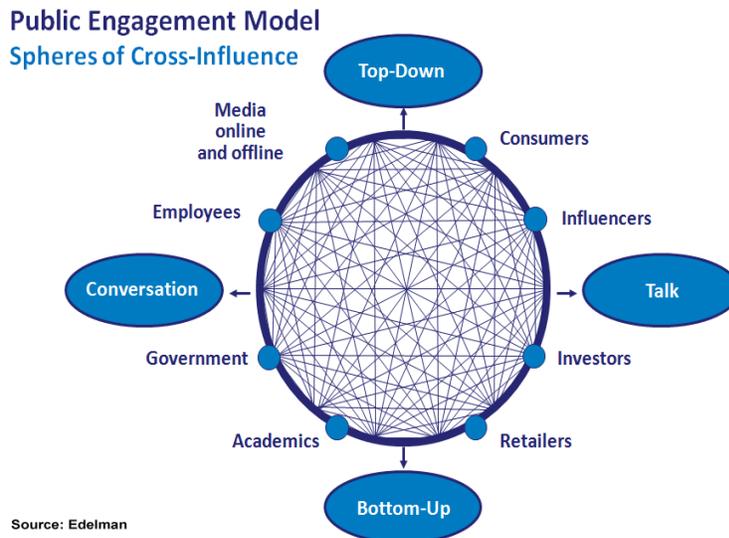
The Obama transition team's use of social media is an indicator of how his administration will operate. On November 6, the team launched Change.gov, a Web site designed to continue the conversation that began during the campaign. The site gave people an opportunity to share their thoughts on important issues and respond to the administration's policy ideas. More than two million people visited the site in the first month of the launch.

Additionally, more than 5,000 people commented on a Change.gov video featuring Health and Human Services Secretary designate Tom Daschle, who called on visitors to submit their ideas about health care reform.[3] In large part, administrations bring an issue agenda into office with them; they already know many of the policies they want to advocate for. Hence, in many respects, this and future videos, will likely be designed for crowd-building rather than crowdsourcing. However, it serves as an example of how the administration can and will demonstrate a *social majority* on each issue it faces by giving people the opportunity to enthusiastically and authentically demonstrate their support for its policies.

Toward this end, on November 15, Obama issued his first President-elect weekly radio address on YouTube so that it could be embedded, shared and commented on easily. It worked: although relatively few people typically listen to the president's weekly address on the radio, Obama's YouTube address was viewed by more than a million people.

During the second week of December, thousands of Obama for America volunteers held house parties to discuss how the campaign's grassroots connections could be channeled to support the president-elect's legislative agenda. They understood - as Obama did - that social media could inspire people, give them a voice, connect them with like minds and help to channel their support, but you still needed boots on the ground to win an election. The interplay between online engagement and offline activity was integral to the campaign's success and will be for the administration as well.

Not only will Obama talk directly to the people using the president's bully pulpit; he can and will mobilize his grassroots to spread the messages, programs and priorities that he would like to pursue. His health care team has already sent e-mails to millions of people on the campaign list and asked them to opt in to receive updates about the incoming administration's planned programs and activities. In naming Gov. Tim Kaine to lead the Democratic National Committee (DNC), Obama is signaling that he may hand these e-mail, SMS and social networking lists to the DNC, which can be more faithful to the campaign's model for social media because it will not limited by the restrictions placed on White House communications.

Further, Obama has said that he will institute a five-day public comment period before signing any non-emergency legislation. In doing so, he will leverage the mass of his supporters to invoke the moral authority to push his proposed agenda.

By the Numbers

E-mail	13 million people on the e-mail list Who received 7,000 variations of more than 1 billion e-mails[4]
Donors	3 million online donors Who contributed 6.5 million times[5]
Social Networks	5 million "friends" on more than 15 social networking sites 3 million friends on Facebook alone[6]
Web site	8.5 million monthly visitors to MyBarackObama.com (at peak)[7] 2 million profiles with 400,000 blog posts 35,000 volunteer groups that held 200,000 offline events 70,000 fundraising hubs that raised $30 million[8]
Video	Nearly 2,000 official YouTube videos Watched more than 80 million times, with 135,000 subscribers 442,000 user-generated videos on YouTube[9]
Mobile	3 million people signed up for the text messaging program Each received 5 to 20 messages per month[10]
Phone calls	3 million personal phone calls placed in the last four days of the campaign[11]

Lessons from Obama's Social Media Campaign

The lessons of the Obama campaign's social media program can be distilled into 10 key learnings that can be used by other organizations to better engage and activate supporters.

1. **Laddering support through tiers of engagement** – The Obama campaign understood that it needed to provide a variety of ways for people to be involved in the campaign based on their level of engagement. As TechPresident noted, the goal was to "provide opportunities for the most casual supporters to stay involved, while also providing more strenuous opportunities for the smaller core of activists."[12]

    As a supporter moves up the ladder, each rung requires more commitment, creates more value, and will tend to hold fewer people. Whether you are canvassing for a candidate or advocating for legislation to Congress, an e-mail is easy to send but can be drowned out easily as well; a phone call requires more effort and carries more weight; a personal visit is the most compelling but also requires the most commitment.

    The Obama campaign gave prospective supporters a menu of options:

    - **Personal -** You could start by friending Obama on a social network. Then, you might sign up for text messages and e-mails to stay informed about the campaign. As a supporter, you may make your first donation or register to vote.

    - **Social -** Once invested, you may post a comment to a friend's profile, telling them why Obama was the right candidate for them. Perhaps you would jump to the MyBarackObama.com (MyBO.com) Web site, where you would create an account. After getting positive feedback on the site, you might join or even create a group.

    - **Advocate -** To drive interest in the group, you may post pictures, write blog posts or create a video declaring your support, which you could post to YouTube. With insights and materials from the campaign, you might host an offline event where you would ask supporters to donate money, register to vote, canvass or phone bank.

Advocate
Recruit others to donate
Host an event
Create a group

Social
Post pictures/videos
Write a blog post
Join a group

Personal
Create a profile
Post a comment
Make a donation
Sign-up for e-mail/SMS
Friend on social networks

2. **Empowering super users** – In addition to providing tiers of engagement for the broader mass of supporters, the Obama campaign offered further support to its most committed advocates. The campaign tracked volunteers and took note of their most reliable activists. The campaign identified these connectors early and gave them the tools to activate others. These super users could create social and fundraising groups on the MyBO Web site. They also could organize their own networks of supporters that gave them access to the Obama database, from which they could pull phone numbers for doing phone banking from their living rooms.

3. **Providing source materials for user-generated content** – The MyBO Web site contained videos, speeches, photos and how-to guides that gave people the raw materials they needed to create their own compelling content in support of Obama. In return, supporters created more than 400,000 pro-Obama videos and posted them to YouTube. They also wrote more than 400,000 blog posts on the MyBO Web site.

    The campaign could not possibly have generated this much content on its own. **And it was better that it didn't.** As Edelman's 2008 Trust Barometer finds, the most trusted source of information is consistently "a person like myself."[13] The authentic user-generated video is more compelling and elicits more support than official productions because we are more trusting of information that is from people who hold similar beliefs, share the same politics or religion, or are the same age or gender as us.

If you heard information about a company from each of these sources, how credible would it be?	North America (%)	Latin America (%)	EU (%)	Asia (%)
A person like yourself	60	83	59	51
Academic	54	72	52	54
Financial or industry analyst	56	75	55	52
Doctor or health specialist	54	80	53	51
Non-profit organization / NGO representative	50	65	50	45
Regular employee of a company	43	57	37	33
CEO of a company	23	56	39	45
Government official or regulator	21	28	32	42
Entertainer/athlete	12	35	11	17
Blogger	11	27	13	16

Source: Edelman Trust Barometer 2008

4. **Going where the people are** – While 60 percent of adults in the United States belong to a social network, most do not belong to more than one. If you want to reach them, you have to know where they are and connect with them there. As Obama adviser Scott Goodstein said: "Some people only go to MySpace. It's where they're on all day. Some only go to LinkedIn. Our goal is to make sure that each supporter online, regardless of where they are, has a connection with Obama."[14] Obama had profiles on more than 15 social networks, including Facebook and MySpace. But he also was the first presidential candidate to have profiles on AsianAve.com, MiGente.com and BlackPlanet.com, influential social networks for the Asian, Hispanic and African American communities.

It is also important to note that Obama was not on *every* social network: he selected the most significant and important platforms in which to participate. While the unsuccessful Edwards campaign was on dozens of social networks, Obama limited his official presence to 15 and leveraged these platforms to direct people to the MyBO Web site, where the campaign had a greater ability to channel people to the specific activities and causes that were deemed the most important to fulfilling the campaign's electoral strategy.

The MyBO Web site served as the hub for electoral activities, with spokes that reached to an array of platforms, all of which drove conversation back to the Web site in order to engage the people, empower the voices, raise the money and get the boots on the ground needed to win the election.

Obama Campaign's Hub and Spoke Model

Source: Edelman
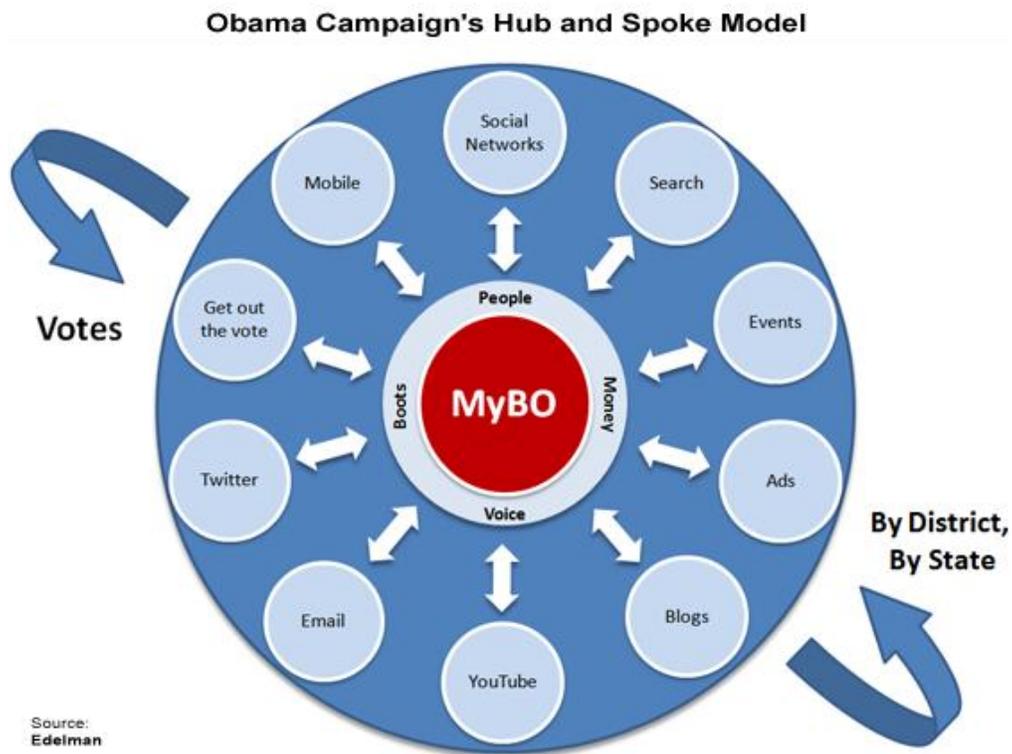
5. **Using tools people are familiar with** – These days, there is a social network for every distinct social niche. There also are umbrella networks that span all interests. Facebook has 150 million members; MySpace has 110 million; LinkedIn is approaching 50 million. These users have invested time, energy and social capital into developing their profiles and engaging other people on their network(s) of choice. The Obama campaign leveraged these existing platforms to maximize the social velocity of its outreach efforts.

   For instance, while Obama had more than three million Facebook friends, supporters also used the tools that they were familiar with in Facebook to find creative ways to spread the message in support of his candidacy. More than 900,000 people joined the "One Million Strong for Obama" group on Facebook. There were Facebook groups for Obama for almost every college in America. The campaign leveraged participation on these existing networks to reinforce messages across platforms and create as many touch points as possible.

6. **Ensuring that people can find your content** – If your content is posted but nobody can find it, does it exist? Can you convert anybody with it? No. According to Google, 90 percent of people who find a Web site through a search engine click on a result from page one of the search results. Therefore you have to be on page one or you will not be found. The Obama campaign understood this: it created simple Web sites with the URLs of popular search terms to increase the likelihood that they would appear at the top of the search results.

   Additionally, when the opposition created videos criticizing Obama (e.g., Reverend Wright), the campaign released videos that used the same tags so that its positive response could be found when people searched for the original. The campaign understood that most people on YouTube use "related videos" to find what to watch. By mimicking tags, people were more likely to find the Obama response alongside the original critique.

   Further, because the campaign knew that more than one-third of people do not distinguish between organic search results and paid search ads, it aggressively purchased search ads to increase the likelihood that users would be driven to friendly information.

7. **Mobilizing supporters through mobile devices** – Ninety percent of Americans are within three feet of their cell phones 24 hours a day. People still read more than 90 percent of their text messages, while pages of e-mails sit unopened in inboxes. Text messaging and the mobile Web offers an opportunity to reach supporters directly anywhere they are, any time of the day. It also is a much more cost effective way to mobilize voters. A 2006 study by the New Voters Project found that text-message reminders helped increase

turnout by four percent at a cost of only $1.56 per vote, much cheaper than the cost of door-to-door canvassing or phone banking, at a cost of $20 to $30 per vote.[15]

The campaign used major announcements to drive people to the mobile platform, such as Obama's choice of Senator Joe Biden as his running mate, which Nielsen Mobile has quantified as the largest mobile marketing event in the United States to date.[16] The campaign sustained interest through five to 20 targeted messages each month. For instance, supporters could text questions about polling places and receive quick responses from the campaign. More than 30,000 people signed up from within Denver's Mile High Stadium while waiting to hear Obama's acceptance speech during the Democratic National Convention. The campaign also released a free iPhone application in October that gave people up-to-date campaign information and organized its contacts to highlight phone numbers for people in key battleground states.
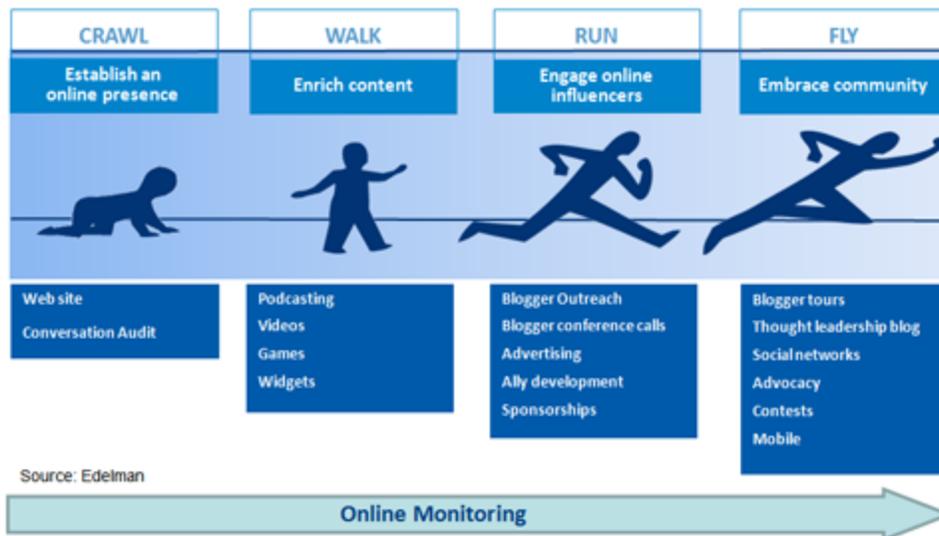
8. **Harnessing analytics to constantly improve engagement activities** – Management consultants call it *kaizen* - the concept of constant improvement. Obama's campaign tracked the success of every e-mail, text message and Web site visit, capitalizing on the analytics that are inherent in digital communications. Each ad and e-mail was created in multiple versions (e.g., different headers, buttons vs. links, video vs. audio vs. plain text) to test what worked and what did not. The campaign developed more than 7,000 customized e-mails, tailored to individual prospects, and made real-time improvements to its outreach materials. Adjustments were made daily to improve performance and conversion. It worked. As the campaign progressed, the effectiveness of the e-mail campaign increased and conversion rates similarly improved.

9. **Building the online operation to scale** - In February 2007, Obama met with Netscape founder and Facebook board member Marc Andreessen to learn how social media could power the campaign.[17] The campaign spent more than $2 million in 2007 on hardware and software that would serve as the foundation for the social media operation. [18] It built an enterprise-level system that was ready to scale to millions of supporters. As the primary season progressed and the general election campaign began, Obama's team continued to look for ways to innovate. It used a "crawl, walk, run" approach, integrating new (and improved) social media elements into the campaign.

The campaign had a few early missteps, including the initial rollout of the mobile campaign featuring ringtones that were widely derided, and an embarrassing public spat with Joe Anthony, a devoted early supporter who was forced by the campaign to forfeit his MySpace.com/BarackObama page and its 130,000 friends so that the campaign could take control of it.[19] But it was able to overcome these miscues by giving its supporters more and better opportunities to create their own social pulpits than any campaign had ever given before.

The Crawl, Walk, Run Methodology for Social Media

Establish **online credibility and trust** through a stepped approach

CRAWL	WALK	RUN	FLY
Establish an online presence	**Enrich content**	**Engage online influencers**	**Embrace community**
Web site Conversation Audit	Podcasting Videos Games Widgets	Blogger Outreach Blogger conference calls Advertising Ally development Sponsorships	Blogger tours Thought leadership blog Social networks Advocacy Contests Mobile

Source: Edelman

Online Monitoring

10. **Choosing the right team** – Long before the intensity of the 2008 campaign kicked in, Obama was already planning his online strategy. The Obama campaign had a core online team of 11 people with a total staff of 30, a number that climbed even higher toward the end of the cycle. While previous campaigns had treated online advocacy as an add-on, the Obama campaign integrated social media into all elements of the organization. Joe Rospars, the head of social media for Obama, reported directly to the campaign manager, David Plouffe. Internet and mobile was integrated into every aspect of the campaign.

The team also included Chris Hughes, one of the co-founders of Facebook, and Kevin Malover, a veteran of online travel agency Orbitz. Julius Genachowski, a longtime friend of Obama, served as the campaign's chief technology advisor. Obama also tapped a distinguished group of advisors, including Google CEO Eric Schmidt and Craigslist founder Craig Newmark. Many of these supporters will follow Obama to the White House, including one who is likely to be named the nation's Chief Technology Officer.

Obama's online campaign reflects the know-how, finesse and expertise that Edelman's award-winning **Digital Public Affairs** team puts into every Web-based public relations program. Edelman implicitly understands how to shape messages for online audiences and develop customized campaigns aimed at achieving public policy objectives. From Web sites, podcasts and viral videos, to issues advocacy, grassroots and blogger relations, Edelman has the most experience navigating the ever-changing online space and integrating online efforts with traditional media and advocacy efforts. Whether it is a first foray into the online space or an opportunity to enhance a client's existing presence, we help to effectively advocate for our client's issues.

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