

FIRST RELEASE

The New Tools of Advocacy
*Lessons for the Policy Community
from the First Wave of Social Media Adoption*

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

Confidentiality and Intellectual Property

These materials have been prepared by National Journal for the exclusive and individual use of our member organizations. As always, members are welcome to an unlimited number of copies of the materials contained within this handout for use within their organization. However, these materials contain valuable confidential and proprietary information belonging to National Journal and they may not be shared with any third party (including independent contractors and consultants) without the prior approval of National Journal. National Journal retains any and all intellectual property rights in these materials and requires retention of the copyright mark on all pages reproduced.

Legal Caveat

National Journal has worked to ensure the accuracy of the information it provides to its members. This report relies upon data obtained from many sources, however, and National Journal is not able to guarantee the accuracy of the information or analysis contained in these materials. Furthermore, National Journal is not engaged in rendering legal, accounting, or any other professional services. National Journal specifically disclaims liability for any damages, claims or losses that may arise from a) any errors or omissions in these materials, whether caused by National Journal or its sources, or b) reliance upon any recommendation made by National Journal.

Our Time Together

Overview of the Inaugural Year of Membership



*Opening Discussion:
The Business Case for Social Media Adoption Now*



*Best Practice Profiles:
Frontier Practices from the First Wave of Social Media*



Coda ~ Strategy in the Turns

Overview of Our A Year of Many “Firsts”



Initial
Service
Launches



Presentation Center Posts
Launch: December 2011
“Arming an Alliance”

Presentation Center Content

- 600+ charts, graphs, full-length presentations
- 10,000+ downloads



Executive Insight Briefings
Launch: January 2012

Executive Insight Briefings

- 39 delivered briefings
- 7,000+ registered uses



Watergate Briefings
Launch: April 2012
“Election Outlook with Charlie Cook”

Watergate Briefings

- 6 events
- 1,100+ participants



Member Webinars
Launch: June 2012
“Supreme Court Health Care Ruling”

Webinars

- 6 events
- 400+ participants



Benchmarking Tools
Launch: August 2012
“Legislative Risk Heat-Mapping Exercise”

Benchmarking Services

- 4 launched initiatives
- More than one-third of members actively engaged in initiatives

Members 0

769*

*As of 10/16/12.

Source: National Journal Membership Research interviews and analysis.

Inaugural Year

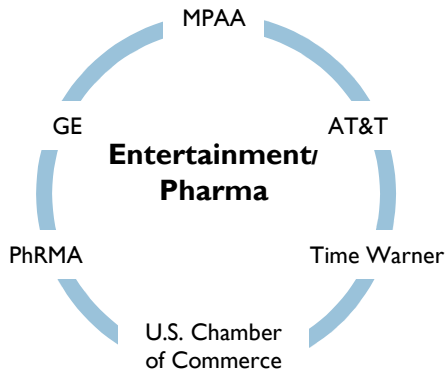
On a Crowded Agenda, One Topic Stood Out

National Journal Membership Research—2012 Topic Poll	
Summary Results Member-Graded Best Practice Study Topics	
Rank	Proposed Topic
#1	Social Media: Case-Example Detail and Best Practice Lessons from Smartest Social Media Campaigns Deployed in Washington
#2	Annual Best Advocacy Campaigns: Detail and Best Practices from Most-Successful Public Policy Campaigns
#3	Legislation Preview: White House, Agency, and Congressional Leadership Priorities for 2012
#4	Best Practices in Low-Cost (High-Impact) Advocacy
#5	Annual State of the Frontier: Best New Practices of Top 100 Most-Progressive Government Affairs Offices in Washington in 2012
#6	Grass Roots: Case-Example Detail and Best Practice Lessons from the Smartest Grass Roots Campaigns of 2012
#7	Best Practices in Building, Strengthening, Recovering a Strong Brand in Public Policy Advocacy
#8	Exceptional Talent: Recruiting, Retention, Compensation of Highest-Performing Government Affairs Staff
#9	Time Famine: Best Management and Time-Management Practices of Washington's Leading (Busiest) Government Affairs Professionals
#10	Best Practices in Measuring the Effectiveness and ROI of Government Affairs Work
#11	Managing External Consultants: Best Practices in Selecting, On-boarding, Managing, Evaluating, and Compensating Consultants
#12	Risk Management: Early Identification and Risk Mitigation Strategies in Government Affairs

Social Media Scoring Highest on Several Key Measures

- **Top Box:** Percentage of “A” grades
- **Top Two-Box:** Percentage of “A” and “B” grades
- **GPA:** Overall weighting of scores provided by all survey respondents

You've Got SOPA Demonstrates That Social Media



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

12
2

10/26/2011
SOPA
introduced

24
3

11/16/2011
House
Judiciary

31
21

12/15/2011
House
markup

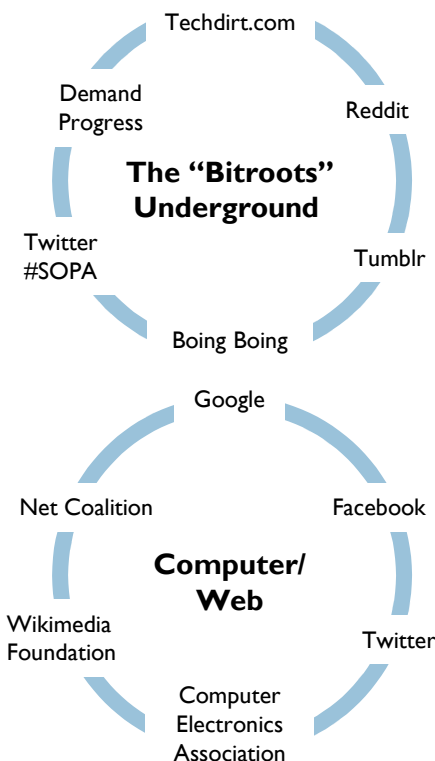
AGAINST

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



Our Attention

Can Change Legislative Outcomes

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

Growing Niche?

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

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

1/18/2012
Internet
blackout

1/24/2012
Vote
postponed
indefinitely



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

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

28
113

23
119

“Web 2.0”:The Social Web

The Contours of Social Media

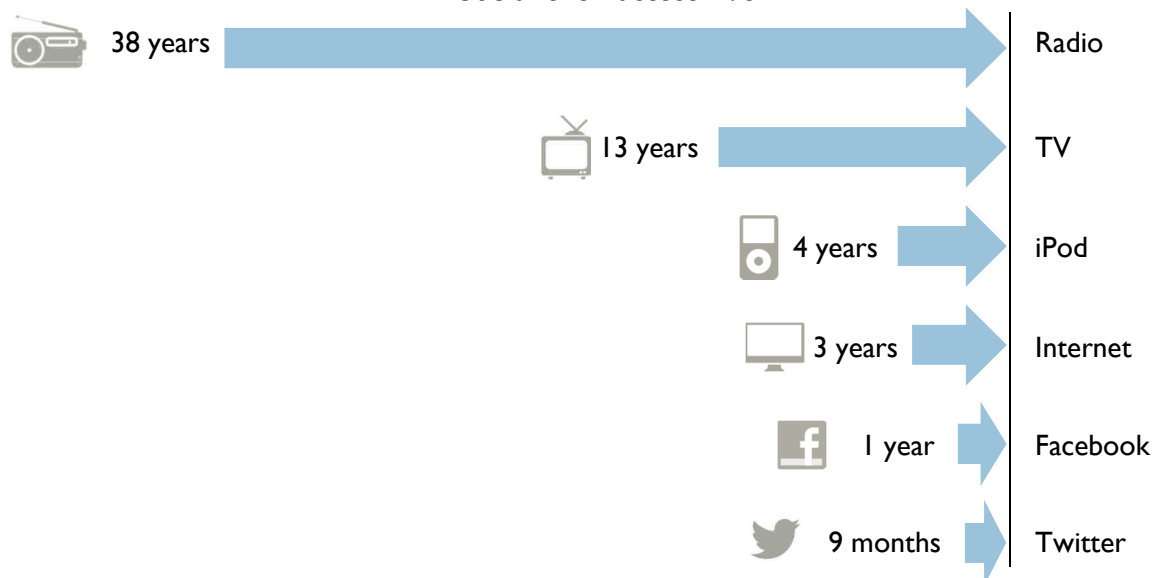
Social Media Defined

Web- and mobile-based platforms designed to not just generate—but to accelerate—sharing of content, collective judgment of content, and interactive dialogue among individuals, communities, and organizations

Hallmarks:

- ✓ *Direct, two-way communication* allowed between individuals and communities, in a many-to-many environment
- ✓ *Non-hierarchical* content sharing rules
- ✓ *Immediate* visibility of posted content among all group members
- ✓ *Instantaneous feedback* possibilities through content sharing options and “up or down” voting features
- ✓ *Networked* structure enabling users to discover and engage new individuals and groups outside their immediate list of contacts

Time to 50 Million Users *Social the Fastest Ever*



Source: McKinsey Global Institute, “The social economy,” 2012; images by the Noun Project; The Conversation Prism by Brian Solis and JESS3; National Journal Membership Research interviews and analysis.

Transforms Online Influence

Out of a profusion of tools and applications...



... several stand out for particular notice in the policy community



Online social networking site where users connect and share content with “friends” and interact with larger organizations as “fans”

Registered Users:
955M



Online social networking site where users find, connect, and share leads, ideas, jobs with other business professionals based on experience, expertise, industry, education

Registered Users:
175M



Video-sharing platform where users upload, search for and comment on videos online

Unique Visitors per Month:
800M



Microblog hosting platform for posting short-form multimedia content; allows selective sharing of content or of full blogs between users

Active Bloggers:
65M



Microblogging service where users can create short posts and provide followers with the latest news stories, ideas, and opinions in real-time

Registered Users:
500M



An Easier Way to Communicate... If You Speak the Language

What is said....

... and what is meant



A **mention**, the "@" symbol, engages other tweeters in the conversation. The tweet shows up in the mentioned user's feed.

To link to a website, a **shortened URL** is used to fit Twitter's 140 character limit.

The **retweet**, (sometimes designated "RT") allows followers to repost a tweet within their own network so that their followers might see it. Retweeting is a popular engagement device.

A **hashtag** (#) is used to categorize tweets. It optimizes search by highlighting the most important keyword and links the tweet to the larger conversation about a particular topic.



What's Cool About Twitter

- ✓ Covers breaking news before traditional media
- ✓ Source of instant commentary on news
- ✓ Shows trending by locale
- ✓ Curates content that your peers choose to share
- ✓ Suggests additional individuals for you to track
- ✓ Uncovers active individuals in an interest area
- ✓ Allows users to identify whom others are following

What It's Good for...and What It's Not

Distinctive Opportunities and Challenges Posed by Social

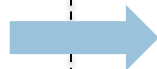
Social Media Represents Peerless Tools for Advancing Some Aims...

Can be used to quickly find, engage,
and activate like-minded individuals

Can be used to source high-volume,
high-value content authored by the
public

Can be used to rapidly test
organizational ideas and messaging
(represents a "24-Hour Focus
Group")

Can be used to spot trending news in
real-time (and in advance of
traditional media)



...But is Limited and Challenging on Numerous Fronts

Is rarely (if ever) an effective tool for
changing views of the opinionated

Is hard to filter given high volume of
"noise"; difficulties in separating
authentic content from spam, junk

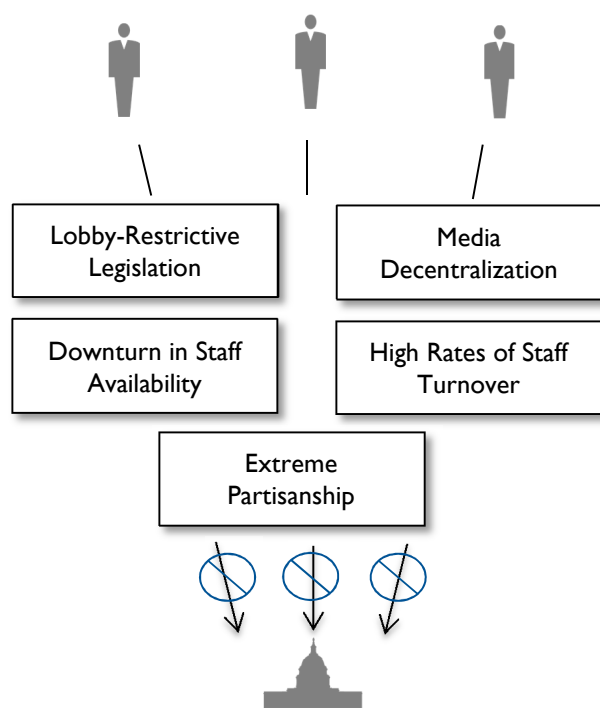
Presents challenge in distinguishing
valid response from targeted
misinformation

Provides a meter for sentiment
rather than "truth" (represents a
democratized information
environment)

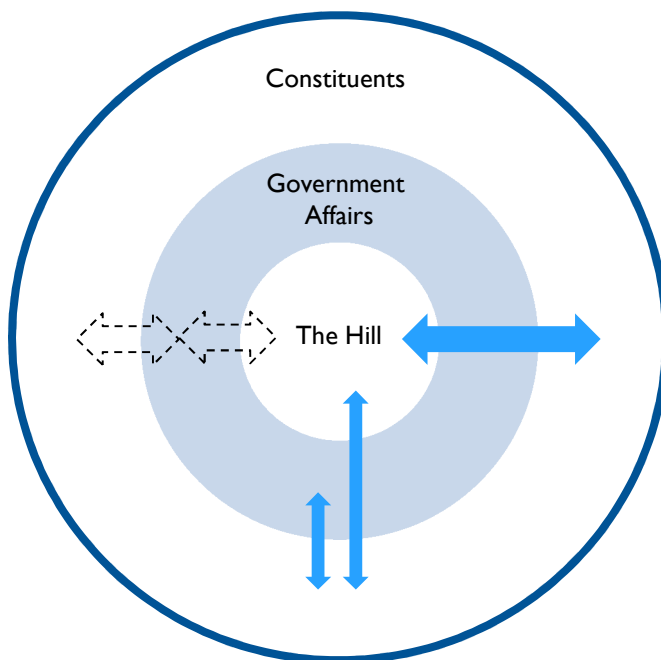
Advocacy is Getting Harder

Levers of Traditional Influence in Decline

Forces disruptive to the Government Affairs function...



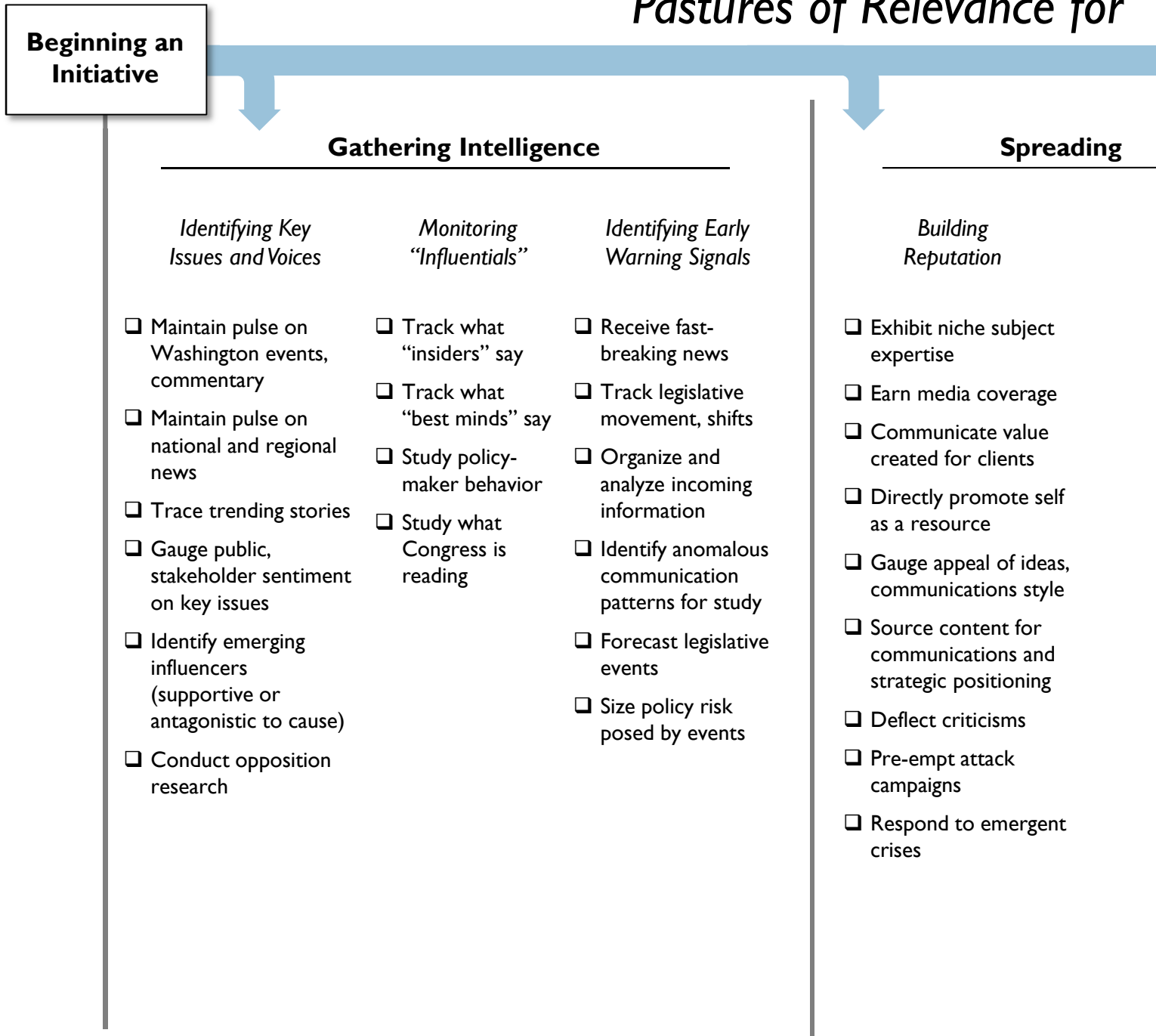
...are driving new models of influence



Approaches Suggested by Emerging Models

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

A Tool with Many Pastures of Relevance for



Source: National Journal Membership Research interviews and analysis.

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



The Business Case for Social Now

The Adoption Logic for the Government Affairs Function

#1:
The Hill
is Acting

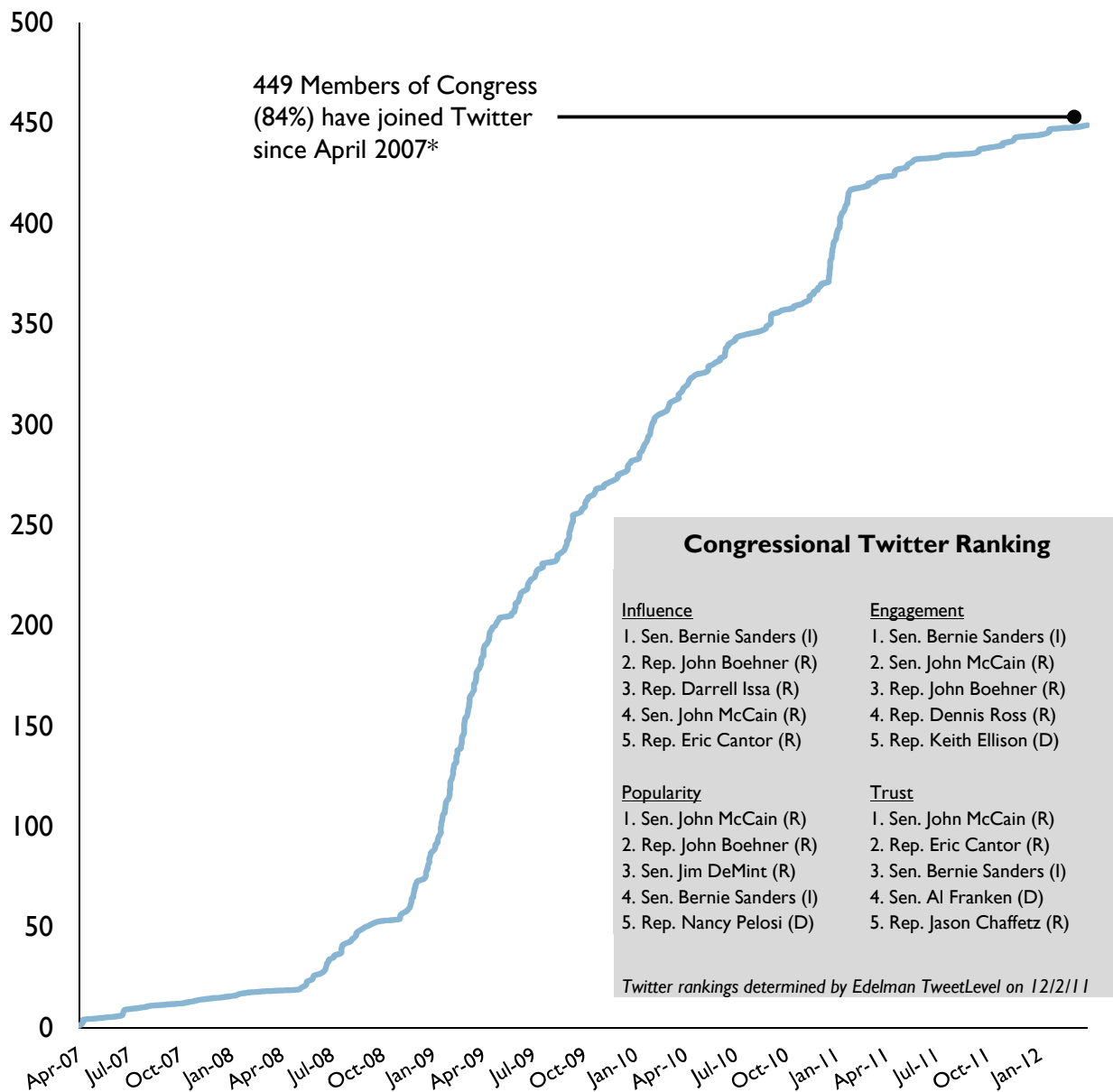
#2:
Ample
Early Learning

#3:
A Steep
(Re-)Learning Curve

The Vast Majority of Congress is on Social

Collectively Over 3 Million Followers Track Lawmakers' Tweets

Members of Congress on Twitter Apr 07 – Mar 12



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

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

Inflecting Policymaker Action

Congressional Chiefs of Staff Descriptions of Social Media Usage

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

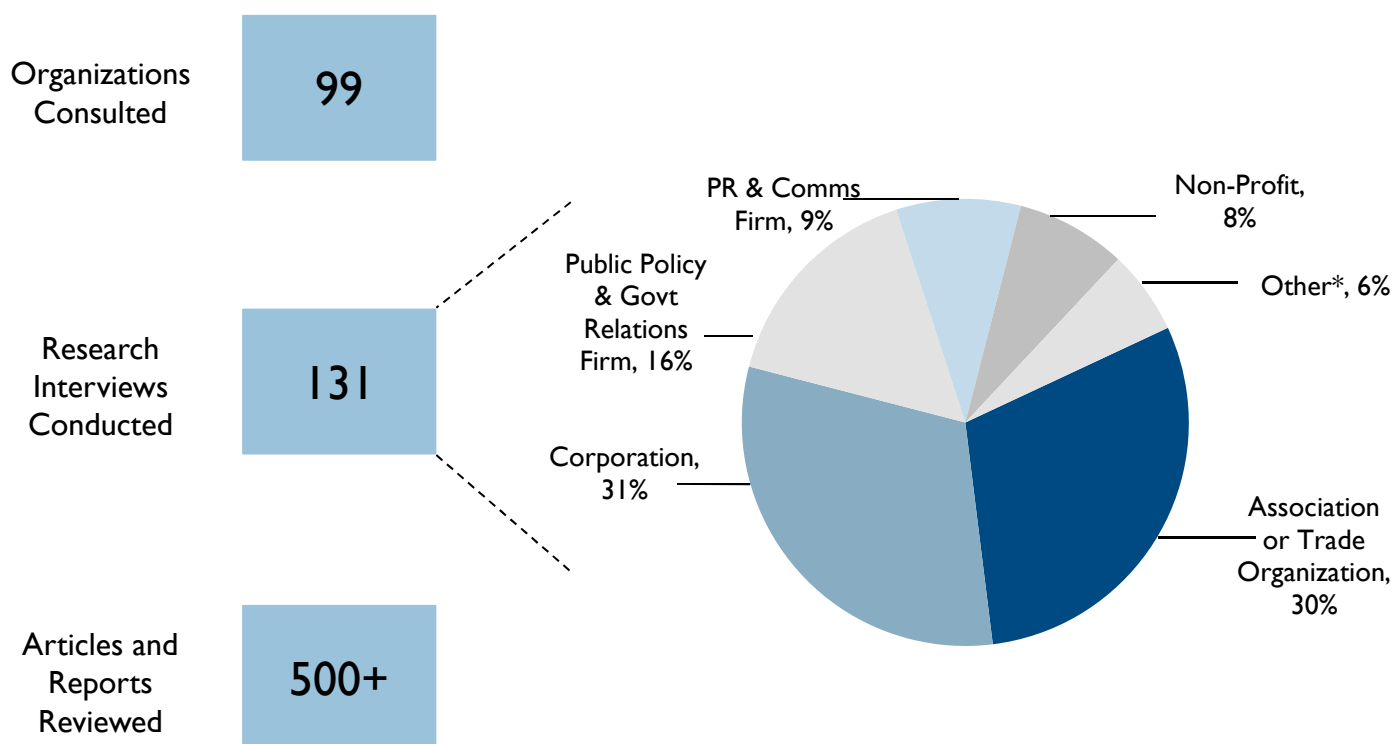
“We listen primarily to what interest groups and leadership are saying in social spaces. Sometimes, it just helps us to form narrative around our viewpoint. But sometimes someone introduces new intel that forces us to go back and research our position, talk to new people...and this has led us to change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

A Deep Dive into the Terrain

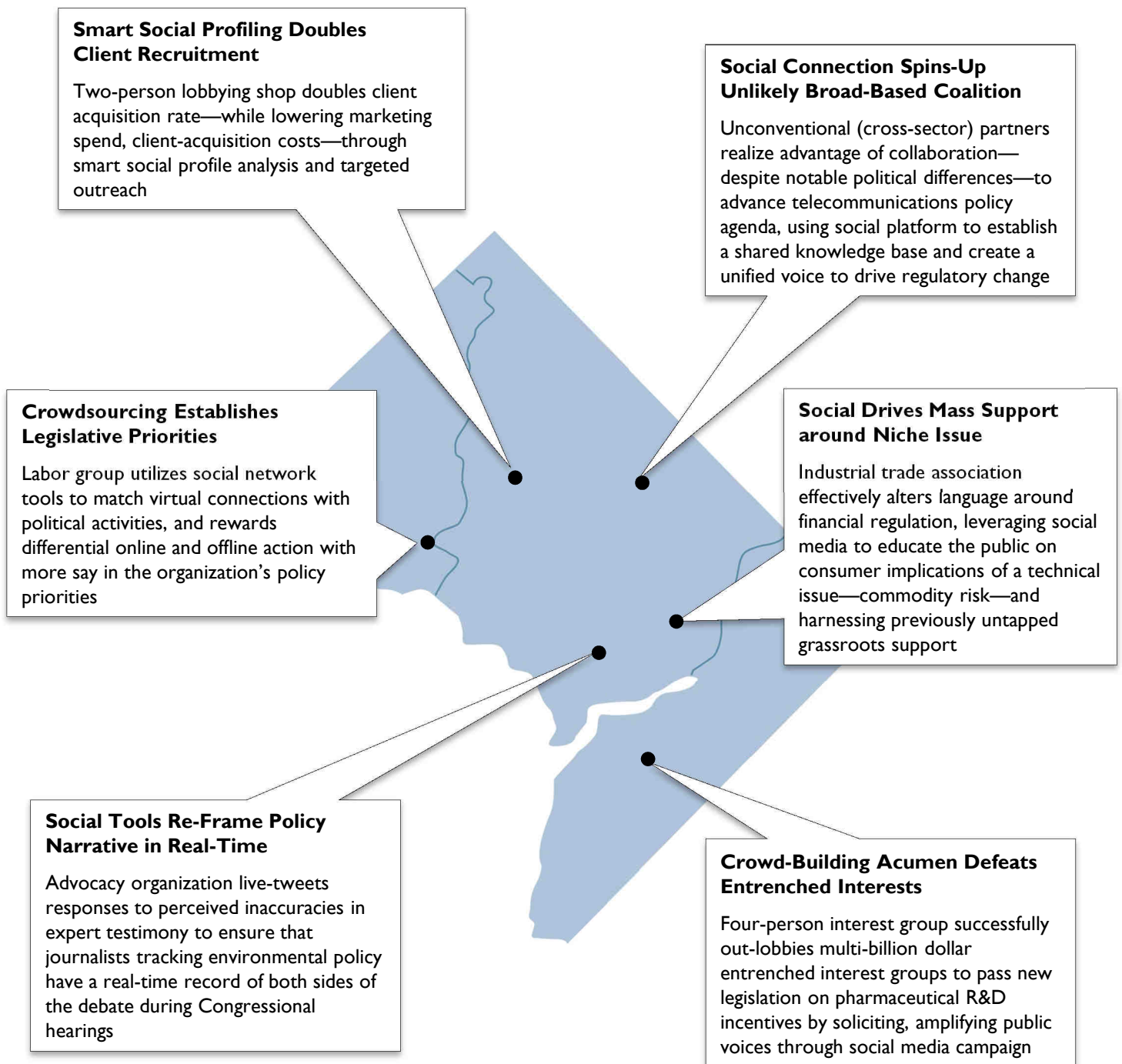
Research Activities Informing our Work



*Analyst/Research Providers, Government Entities, Media Organizations, Research/Higher Education Institutions.
Source: National Journal Membership Research interviews and analysis.

Advanced Social Media Exploits inside Beltway







Beyond Experimentation at Some Organizations



Source: National Journal Membership Research interviews and analysis.

Instincts Fail

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.

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

The New Tools

Lessons for the Policy Community from

	Surfacing Risks and Opportunities Through Social Media		
	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	#1 The Beginner’s Toolkit: Smart Dashboard Construction <ul style="list-style-type: none"> Key issue trends Stakeholder sentiment analysis Heuristics for predicting policy shifts 	#2 Influencer Ecosystem Mapping 	#3 Specialized Spokesperson Roles  #4 Newsjacking

Source: National Journal Membership Research interviews and analysis.

of Advocacy

the First Wave of Social Media Adoption

Strengthening Reputation Through Strategic Online Engagement

IV. Defending Against Social Media Attacks

- Holding fire when assaulted 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



The New Tools

Lessons for the Policy Community from

Surfacing Risks and Opportunities Through Social Media		
Key Themes	I. Tracking Emerging Issues	II. Identifying Online Influencers
	<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
Profiled Practice	III. Positioning Opinion to Get Noticed	
	<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

Strengthening Reputation Through Strategic Online Engagement

IV. Defending Against Social Media Attacks

- Holding fire when assaulted 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



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 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 “outside-the-Beltway” translations for key policy terms as well as key stakeholders who are active online. Initial use of precision key words to trace stakeholder conversations illustrates volume and tonality of issue-based discussions for use in organizational planning and positioning. As users become more familiar with the rhythms and behaviors of tracked communities, they are able to spot deviations from the norms that highlight moments of potential for a policy shift.

Result: Smart dashboarding allows organizations to more effectively track the social conversation, ultimately enabling better risk management and identifying prime opportunities to take action or alter strategy.

Laws of Social Media in Action

- ☐ Community Contribution
- ☐ Transparent Motivation
- ☒ Anonymous Critique
- ☐ Cocktail Etiquette
- ☐ Crowd Arbitration

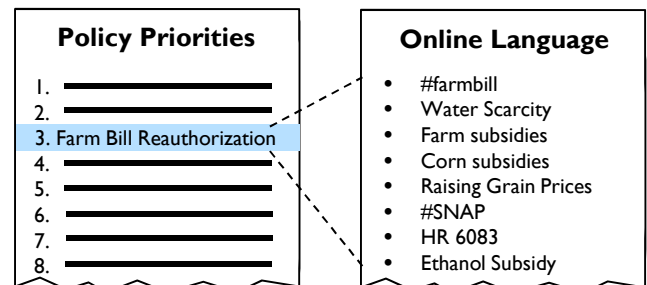
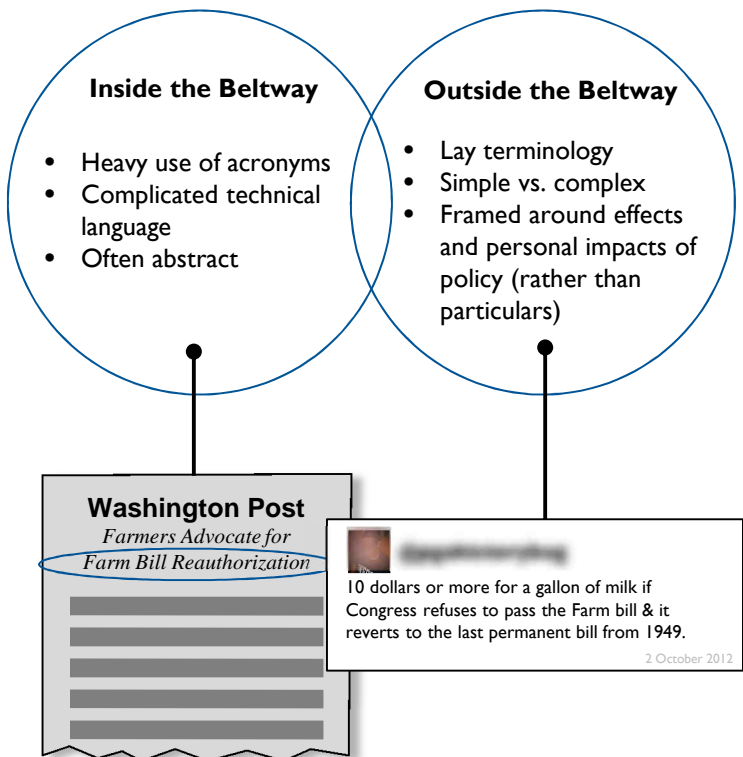
- ☒ Collective Narrative
- ☒ Short Distances
- ☐ Quick Bursts
- ☐ Conservation of (Personal) Energy
- ☒ ‘Selfish’ Sharing

Different Vocabularies in Social Spaces

Reliance on Inside the Beltway Jargon Conceals Rich Dialogue

A (Sometimes) Divergent Vernacular

Translation Required for Capturing All Relevant Voices



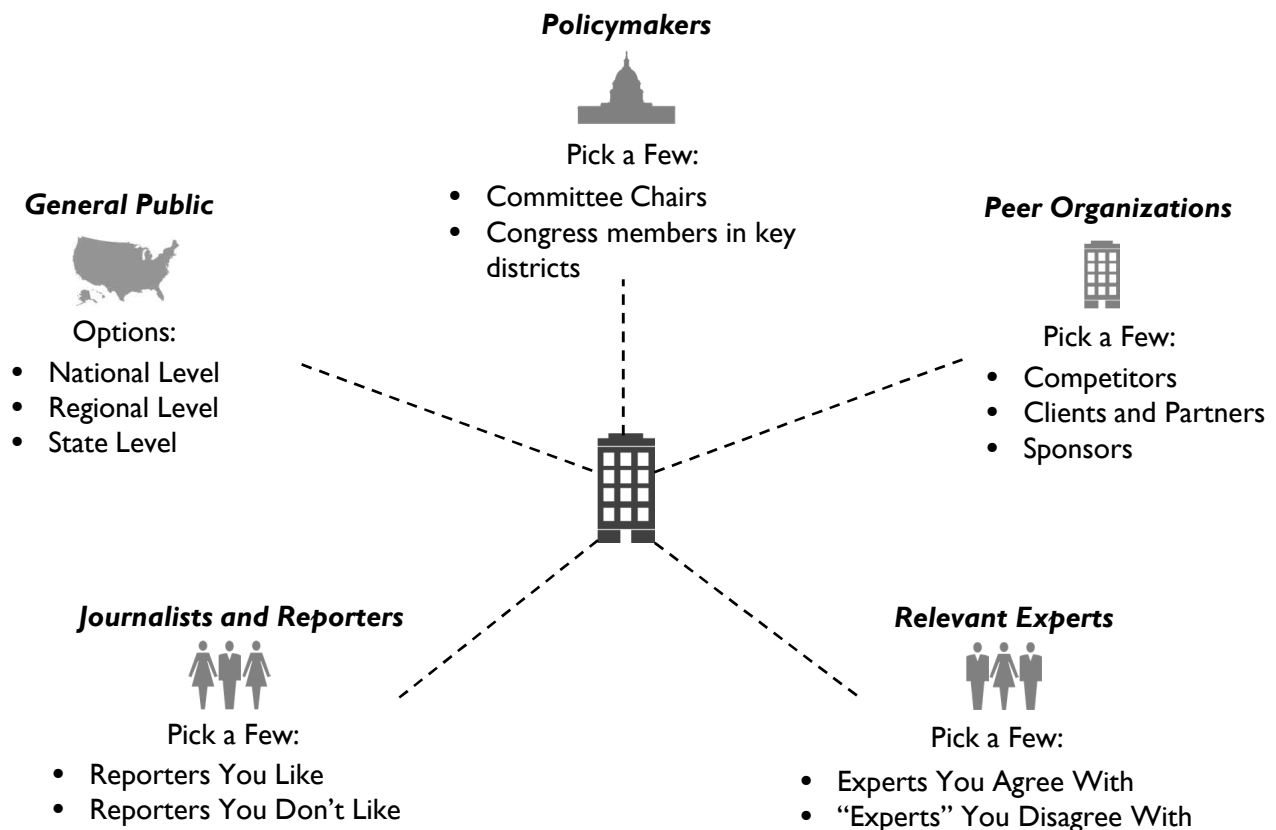
Tips for Surfacing Key Terminology

- 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

Key Stakeholders to Monitor

Selecting a Necessary Few to Get Started

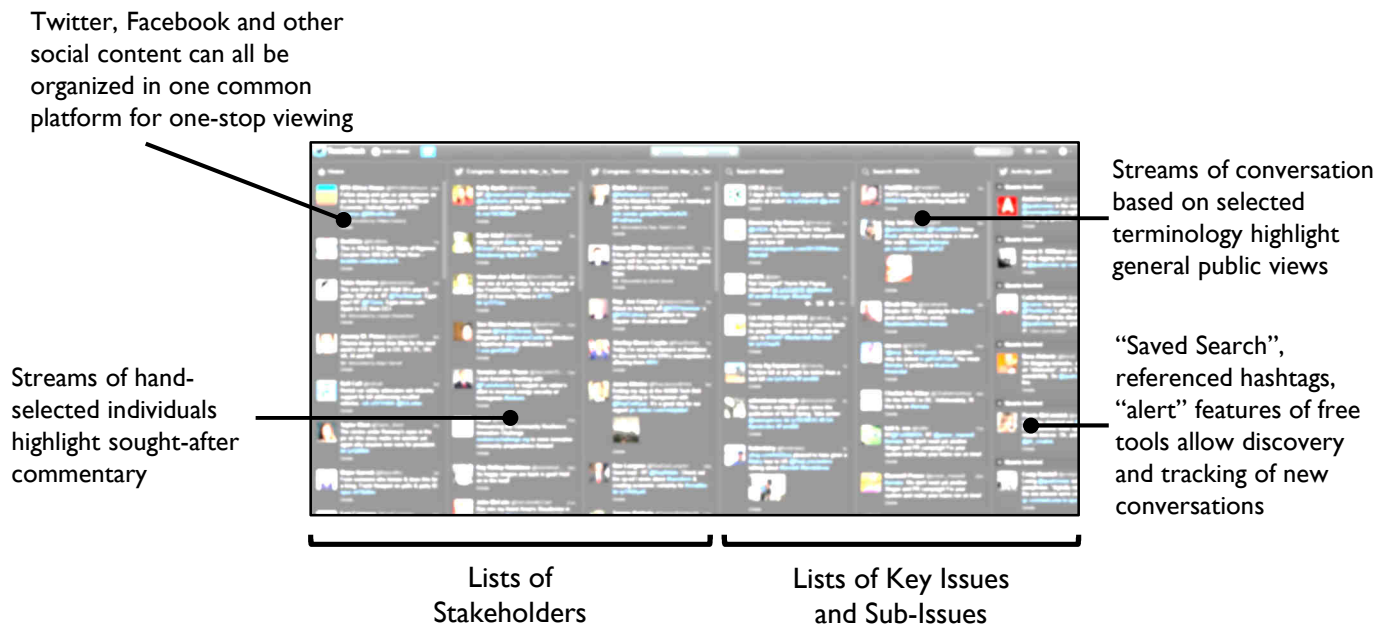
Whom to Track in First Social Media Forays



Developing a Real-Time Monitoring Tool

Gaining a Glimpse of the “Underground” Conversation

Basic Tracking Tool Design



Tips for 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

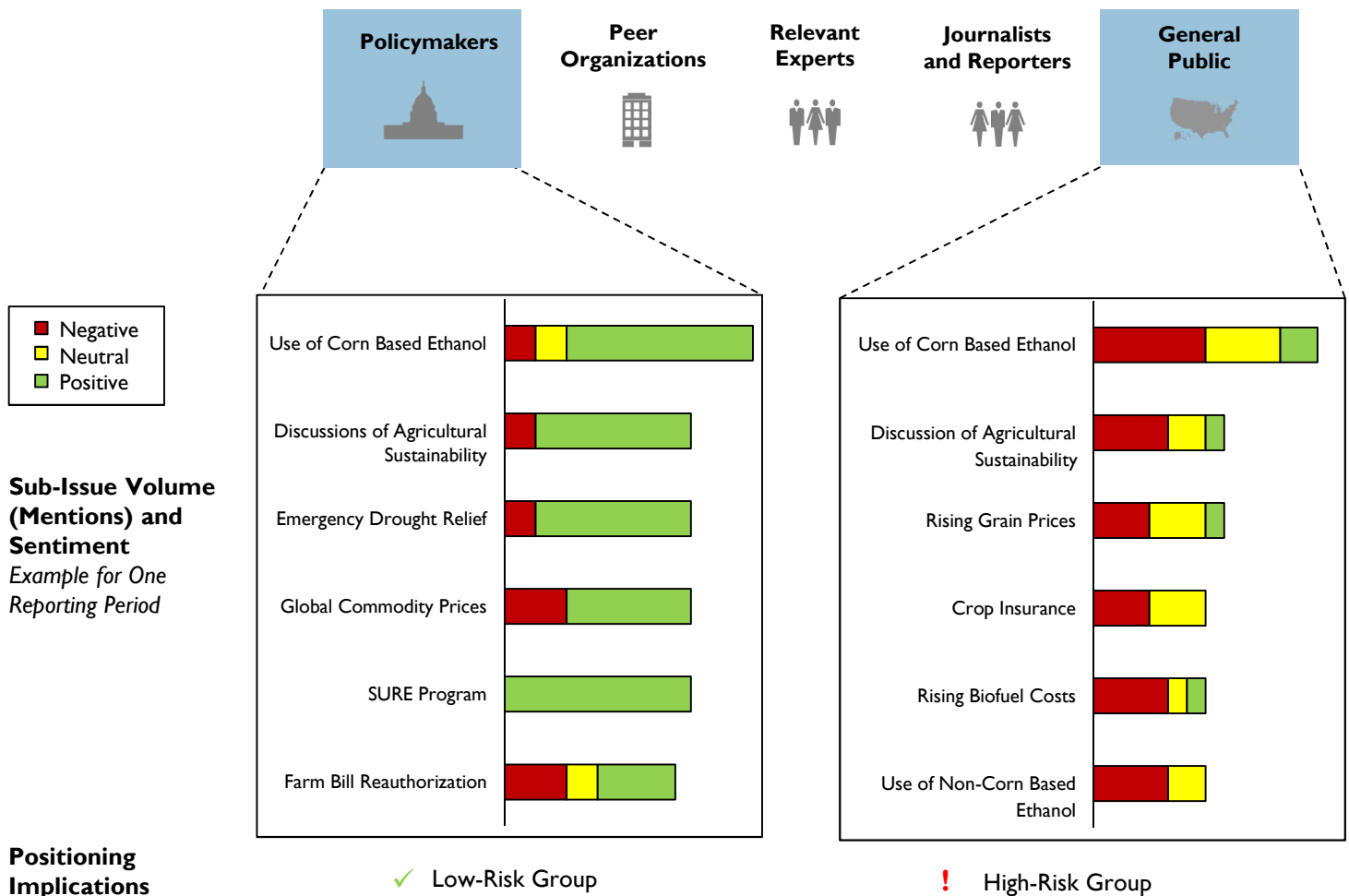
Thoughts on Analyzing the Data

- ☑ 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

Building an Executive Dashboard

Initial Application: Volume and Sentiment Tracking

Example from One Firm



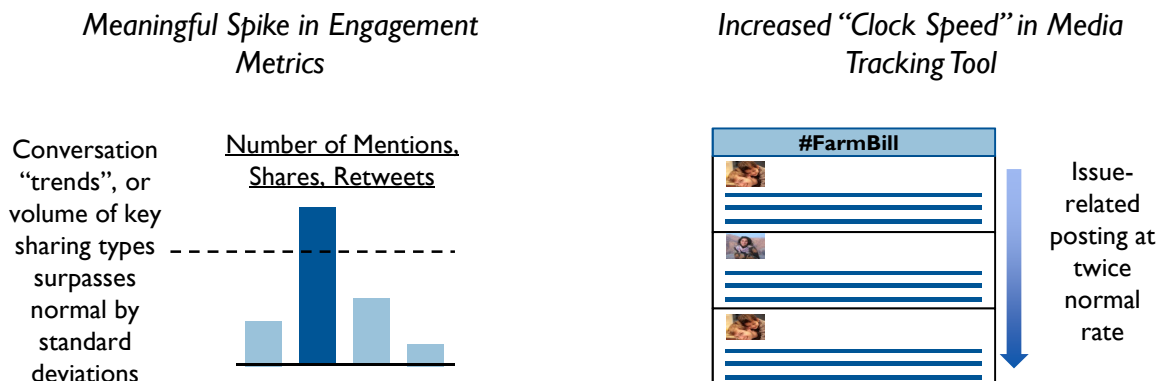
Applications of Data

- ✓ 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, sub-issues – and specific sentiment expressed around those issues – to sculpt a resonant policy message
- ✓ Track changes to the above over time

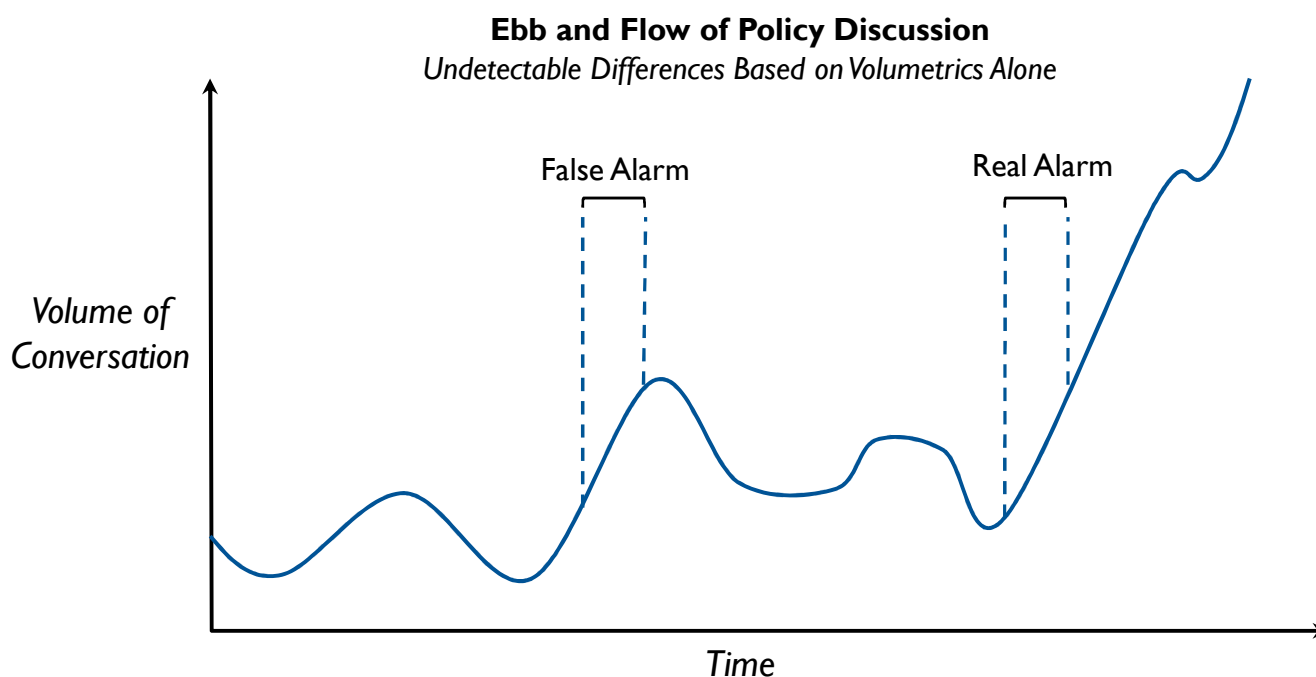
Distinguishing Between Substance and Noise

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

Numeric Indicators Signaling Need for Attention



...but frustrates attempts to predict what happens next



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

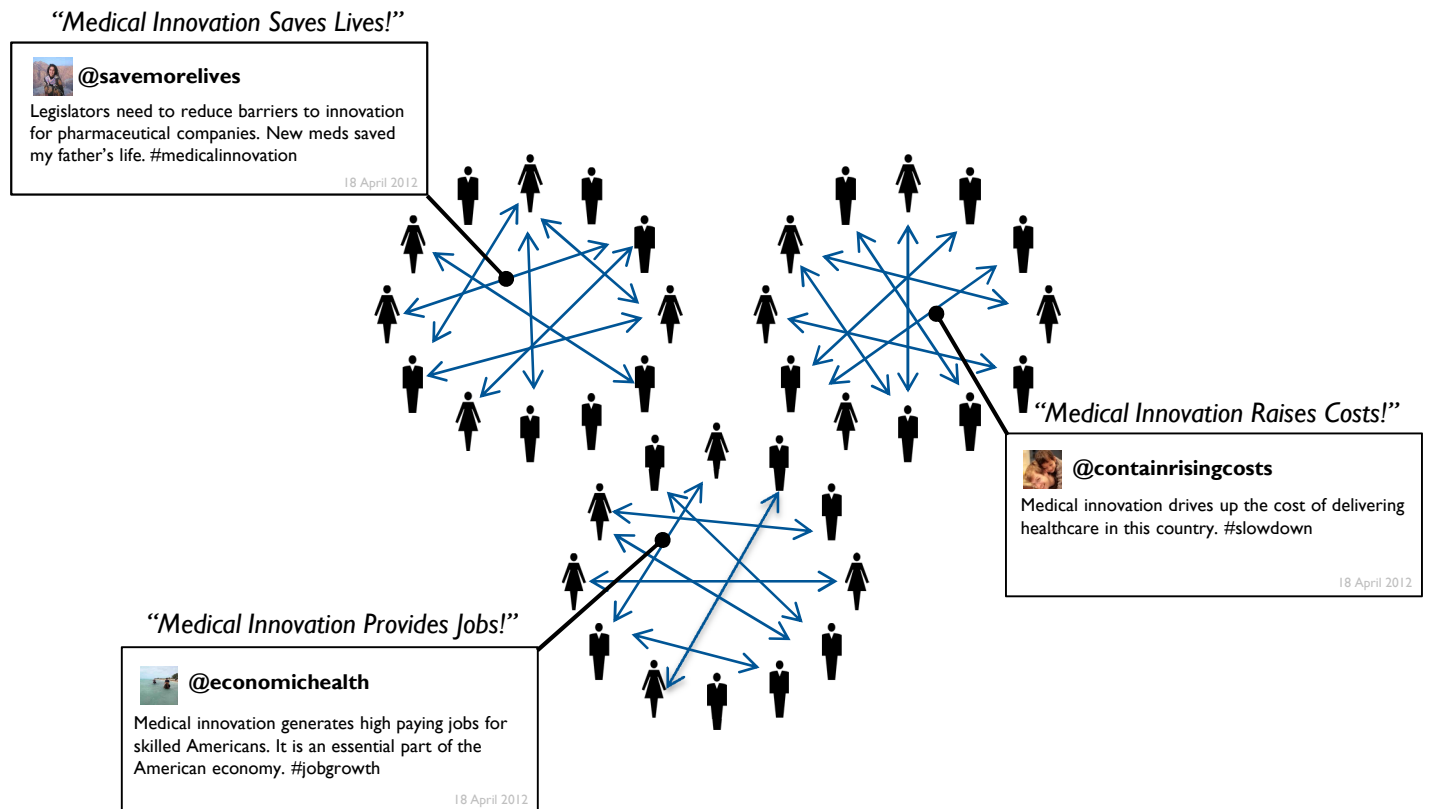
Reasoning
it Out

Leveraging
Experience-
Based
“Spidey Sense” ↓

Tendency to Cocoon in Social Channels

Insular Chatter within Like-Minded Communities Dominates

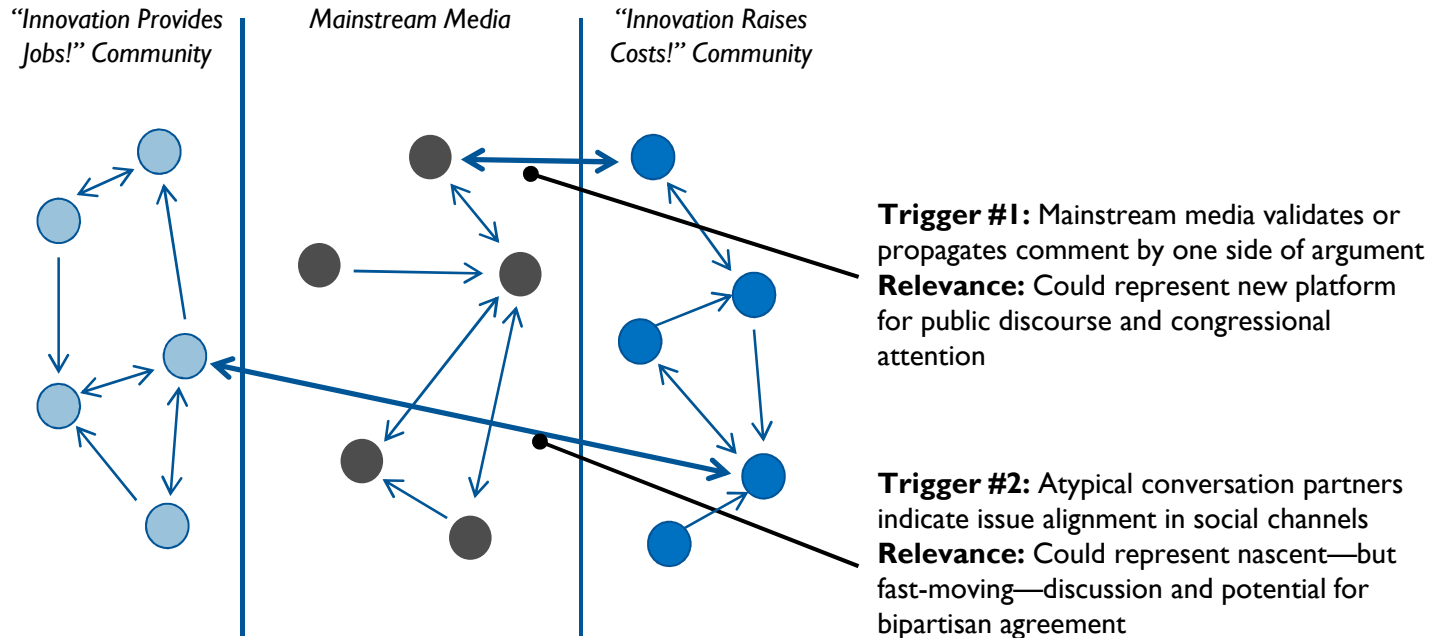
Representative Sentiments of Different Social Media Sub-Communities



Atypical Conversations Trigger Interest

One Expression of a Seasoned Listener's Recognition Skills

Monitoring Across Groups for “Break-Out” Conversation



Case in Brief



Profiled Organization: PhRMA
Organization Type: Trade Association

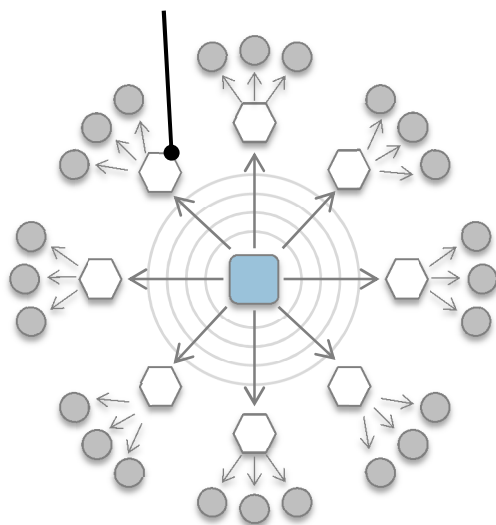
Headquarters: Washington, DC

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

Different Mechanics of Influence

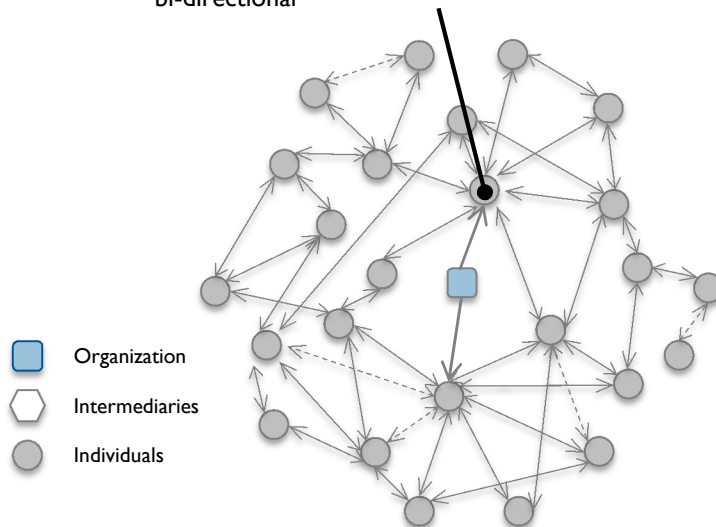
Traditional View of Influence

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



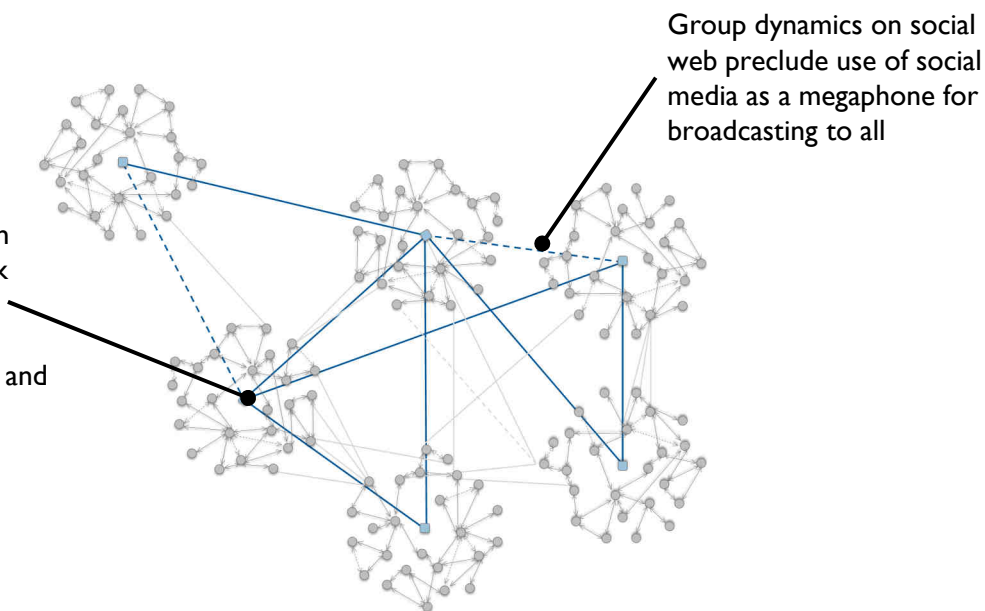
Network View of Influence

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

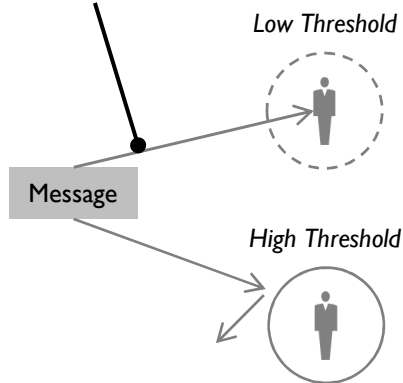
Source: Duncan Watts and Peter Dodds, "Influentials, Networks and Public Opinion Formation," 2007; Paul Adams, Grouped, 2011; Paul Adams, "How Your Customers' Social Circles Influence What They Buy...", 2011; person images by the Noun Project; National Journal Membership Research interviews and analysis.



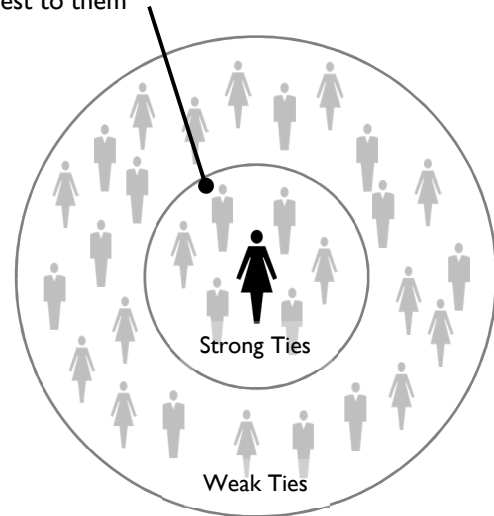
The Spread of Ideas in Social Networks

The Path to Persuasion

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

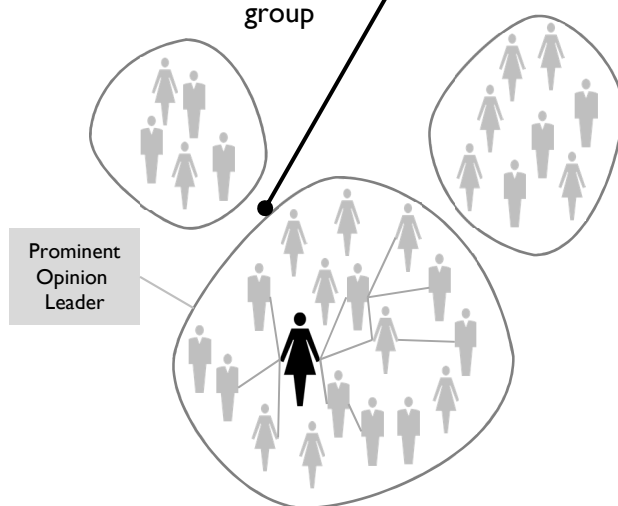


Generally, individuals are most receptive to ideas promoted by a small group of people closest to them

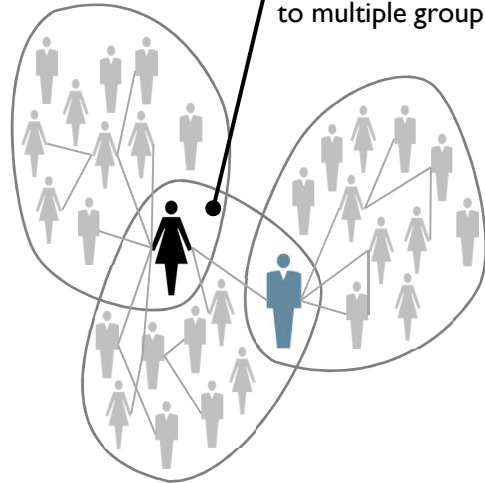


Connectedness Across Groups is Key to Transmission

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.

Understanding the Key Online Players

Profile	Social Role	Predominant Traits and Advocacy Impact
Subject-Matter Experts 	Idea-Originator	<ul style="list-style-type: none"> • Originate 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 	Lurkers	<ul style="list-style-type: none"> • Listen to conversations, absorb content • No (visible) online activity

Understanding Different Types of Influence

On the Hunt for Issue-Makers

One Organization's Taxonomy of Influencers

Upstream Influencers
*Subject-Matter Experts or
Passionate Issue Drivers*



Think Tank Fellow


Editor for
Political Journal in DC


Citizen Blogger


Economics Professor

Top Influencers: "Issue-Makers"
*Individuals Who Magnify, Interpret,
and Contextualize Issues*


**Journalist-Blogger
for National News Publication**

- Shares or builds on content generated by upstream voices (source)
- Interacts downstream with voices who receive and share content

Downstream Recipients
*Individuals Adopting Language
or Arguments of Issue-Makers*


Congressional Staff


Op-Ed Editor


Local News Reporter


Administration Official

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 their issues in social spaces, organizations typically have limited understanding of the relative influence each party exerts upon 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 the significant online voices for its policy priorities, and calculates the comparative influence of each voice by using an algorithm that heavily weights specific engagement metrics. Identified “top influencers” can then be observed to uncover inbound and outbound sharing, and visually mapped to illustrate the paths of influence across the social network.

Result: The influence-sizing and -mapping exercise surfaced powerful but previously unknown voices, clarity as to who interacts with whom, and thus, intelligence for more effectively and efficiently inserting messages into the online policy dialogue where it matters most—the conversations likeliest to influence others.

Laws of Social Media in Action

☒ Community Contribution

☒ Transparent Motivation

☐ Anonymous Critique

☐ Cocktail Etiquette

☐ Crowd Arbitration

☐ Collective Narrative

☒ Short Distances

☐ Quick Bursts

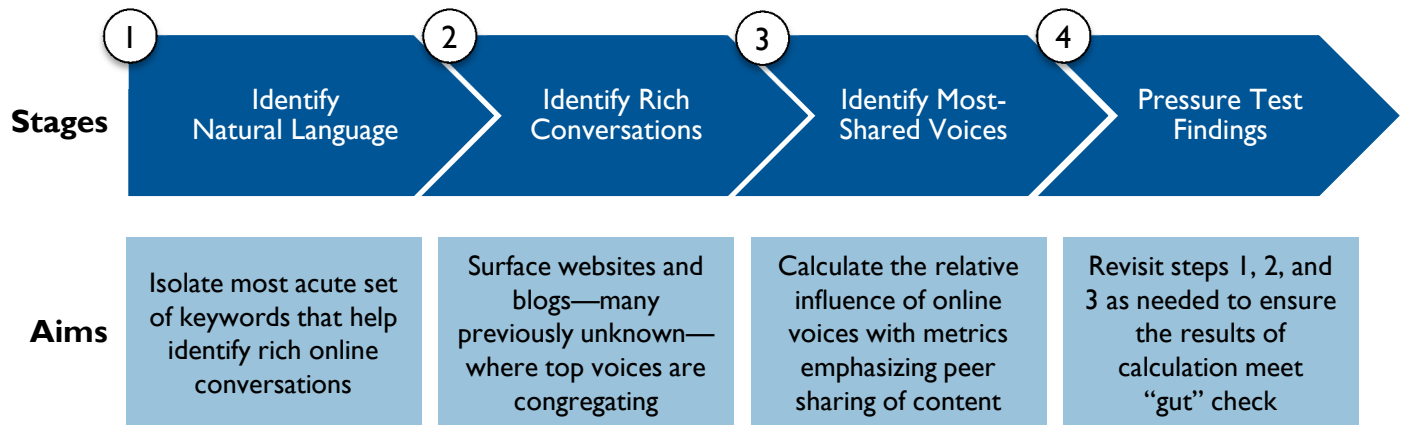
☐ Conservation of (Personal) Energy

☒ ‘Selfish’ Sharing

Systematizing the Search

Keywords Open the Door

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

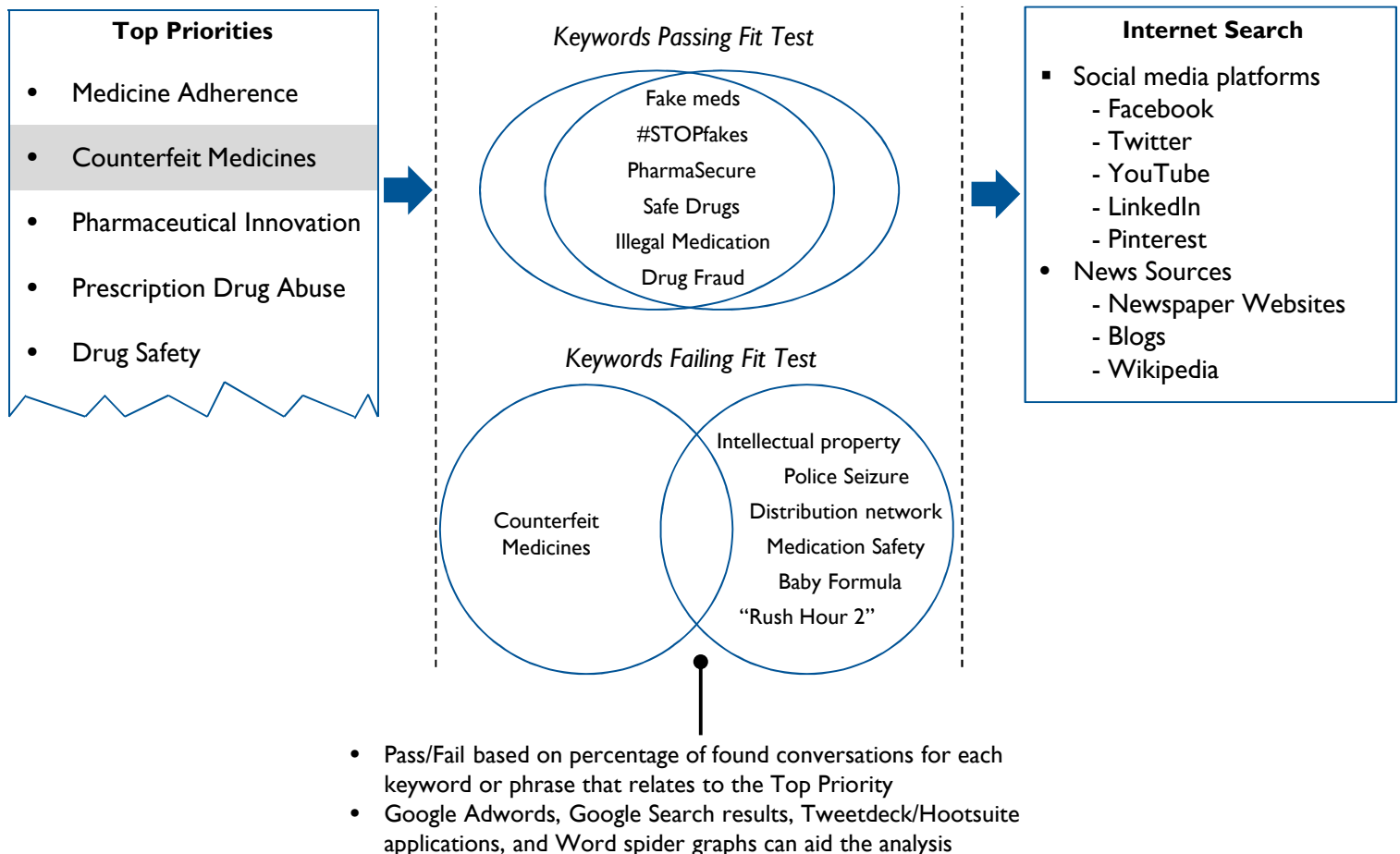
Using Keywords to Surface Pertinent Dialogue

Favoring Acuity of Language Over Volume

Each top priority...

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

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



Calculating the 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 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

YouTube:

- Views
- Likes-Dislikes
- Shares
- Subscribers

Blogs:

- Comments
- Ping backs
- RSS subscribers
- Page views

General Volumetrics to Consider *(not exhaustive)*

- Regularity of individual's sharing
- Number of sharers

Force-Ranking Top Influencers

Tiered Approach to Engagement Maximizes Resource Efficiency

Relative Ranking of Top Online Influencers

	Influencer Score	Index Score	Influencer*	Role*
Tier 1 Develop Relationships Offline and Online • 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
Tier 2 Develop Relationships Online • 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
Tier 3 Monitor	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

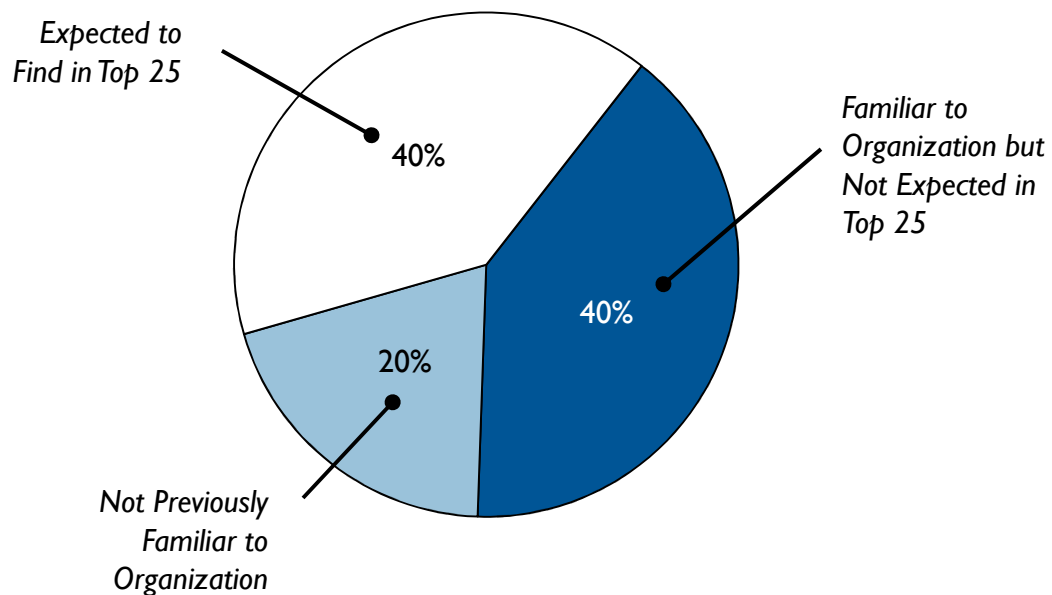
* Illustrative Example; Masks real names and roles

Source: National Journal Membership Research interviews and analysis.

Reorienting Focus Toward Right Individuals

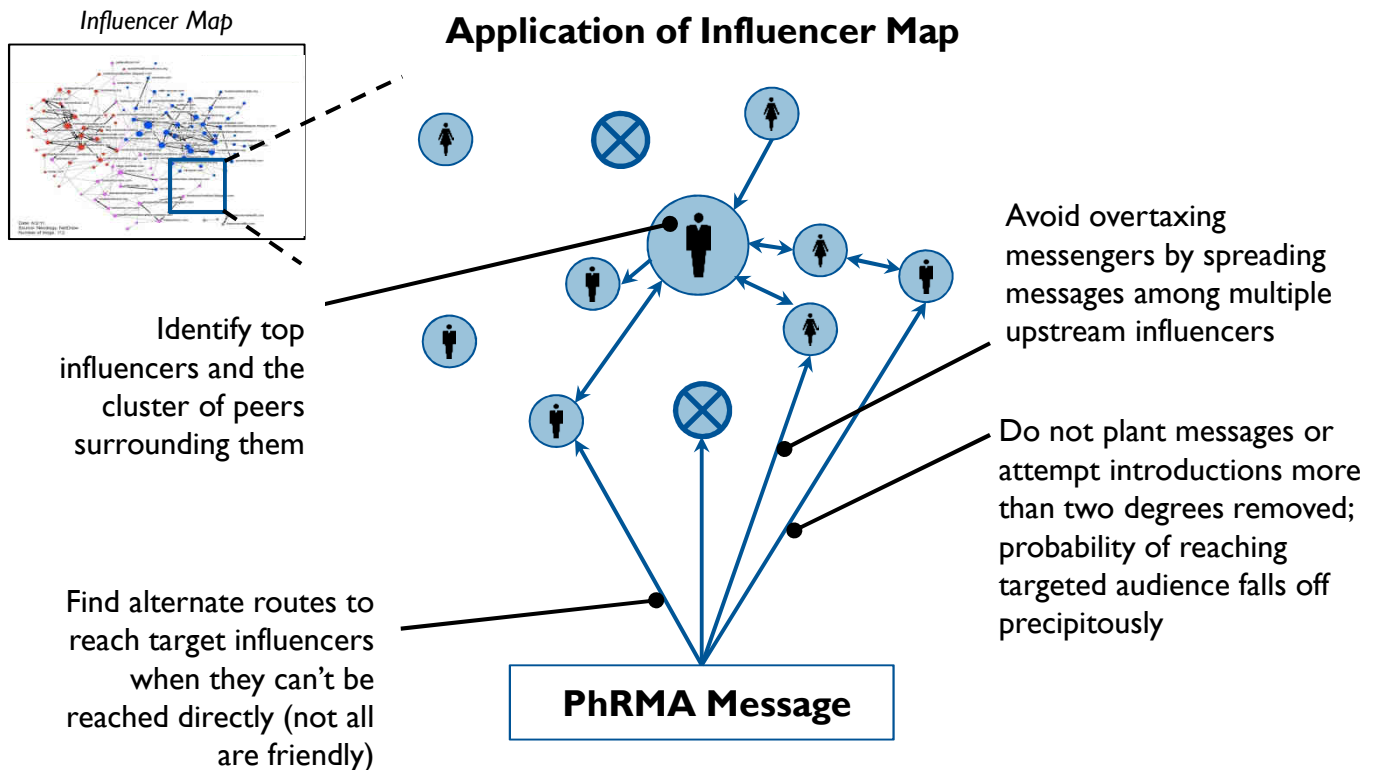
Mapping Exercise Reveals Many Surprises

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



Selecting Optimal Insertion Points

Building and Using the Influencer Map to Reach Top Influencers



Additional Implementation Tips

- Each influencer has preferred method of communicating; general rule of thumb is to use platform the influencer historically prefers or if in response to a previous comment, the one currently in use
- If experiencing trouble getting a response over private channels, consider communicating in a public forum (blog comment, Twitter mention, etc.) that makes it difficult for the influencer to ignore
- Always support expressed point of view with evidence to support claims being made; share web links to research studies and/or data that reinforce argument

Surfacing Risks and Opportunities Through Social Media

Key Lessons

Tracking Emerging Issues

- #1: 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.
- #2: In order to identify important emerging issues and positions at the source, a much more sophisticated understanding of the online environment—common social roles, “real world” language and the structure of online networks, the location of important “watering holes”, and the nature of sharing in the social space—is necessary.
- #3: 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 spaces offer an unprecedented opportunity to understand whose opinions each of these constituencies seeks, and to track how and when the positions of stakeholders develop.

Identifying Online Influencers

- #4: While subject-matter experts and issue-passionates fill the social space with new ideas and rich narrative, an important new role—“issue-maker”—is disproportionately responsible for the ideas that gain real traction.
- #5: Issue-makers possess a rare combination of traits: on the one hand, they are deep enough in the 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).
- #6: For professional policy advocates, identifying the top issue-makers in their policy spaces is an essential exercise for tapping the value of social media; while the community collectively controls the direction of conversation, its trust in these individuals gives them disproportionate influence in shaping the dialogue.
- #7: 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 context.
- #8: 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.
- #9: 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 makes issue-makers so valuable.

The New Tools

Lessons for the Policy Community from

	Surfacing Risks and Opportunities Through Social Media		
	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	#1 The Beginner’s Toolkit: Smart Dashboard Construction <ul style="list-style-type: none"> Key issue trends Stakeholder sentiment analysis Heuristics for predicting policy shifts 	#2 Influencer Ecosystem Mapping 	#3 Specialized Spokesperson Roles  #4 Newsjacking

Source: National Journal Membership Research interviews and analysis.

of Advocacy

the First Wave of Social Media Adoption

Strengthening Reputation Through Strategic Online Engagement

IV. Defending Against Social Media Attacks

- Holding fire when assaulted 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



From a Robot to a Human Voice

Or: Why your Tweets are Failing the Turing Test




Source: "Call Deckard: 'bot tricks judge into thinking it's human," DVICE, <http://dvice.com>.

Attributes of a Voice that Carries

Tips for Speaking Effectively on Social Media

Profile <i>Come As You Are</i>	<input type="checkbox"/> Disclose your employer, location, background <input type="checkbox"/> Don't be an "egg"
Content <i>Add to the Mix</i>	<input type="checkbox"/> Balance between personal and professional; be human <input type="checkbox"/> Change topics from time to time <input type="checkbox"/> Contribute original ideas <input type="checkbox"/> Add new and relevant angles on issues <input type="checkbox"/> Focus on issues of emotional resonance for audience <input type="checkbox"/> Play to the Zeitgeist
Sharing Pattern <i>Reciprocity Rules</i>	<input type="checkbox"/> Be polite in back-and-forths <input type="checkbox"/> Source and give credit <input type="checkbox"/> Don't tweet the same message repetitively
Tone and Language <i>"No Snark" Zone</i>	<input type="checkbox"/> Use common (outside) language <input type="checkbox"/> Be emotive, alluring... but not distasteful <input type="checkbox"/> Be personal <input type="checkbox"/> Be humble, not hierarchical <input type="checkbox"/> Show your "fun gene"

 Especially important for being heard by policymakers

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,” given greater license to speak, and receive regular training to enhance their effectiveness as online influencers.

Situation: Organizations desiring to inflect issue-level online policy debates find that using a centralized, institutional voice can foil efforts to join in meaningful, two-way social dialogue. As well, communications staff frequently lack the bandwidth and specialized expertise required for acceptance as credible participants in issue-specific conversations.

Action: Organization designates select individuals from around the organization—individuals possessing great storytelling abilities, as well as issue-specific knowledge related to the association’s policy priorities—to serve as spokespeople. Spokespeople represent a collection of authentic, interactive digital voices representing the organization and its positions. Regular training sessions and group learning exercises are provided to share best practices and elevate group performance in inflecting niche (influence) community discussions.

Result: Though the program is still in its first year, a subset of spokespeople has been able to distinguish their voices in active policy debates and make connections with top influencers.

Laws of Social Media in Action

☒ Community Contribution

☒ Transparent Motivation

☐ Anonymous Critique

☐ Cocktail Etiquette

☐ Crowd Arbitration

☐ Collective Narrative

☒ Short Distances

☐ Quick Bursts

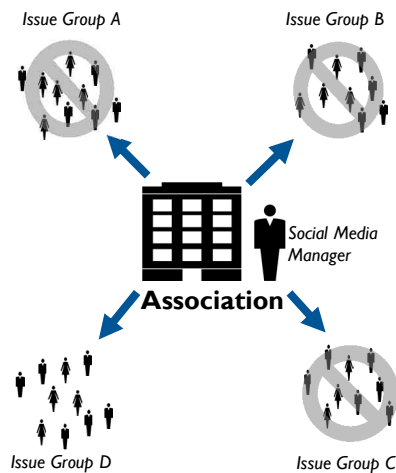
☐ Conservation of (Personal) Energy

☒ ‘Selfish’ Sharing

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

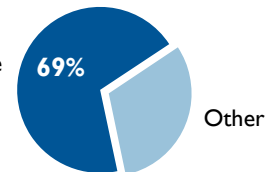
“What has been hard for us is finding time to become regular contributors in all of the niche discussions—the ones that ultimately feed and influence broader debate—happening at the issue level. And frankly, even if we did, few on our team have the expertise to be credible voices in those debates.”

*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)*

Self-serving,
one-way message
advertising

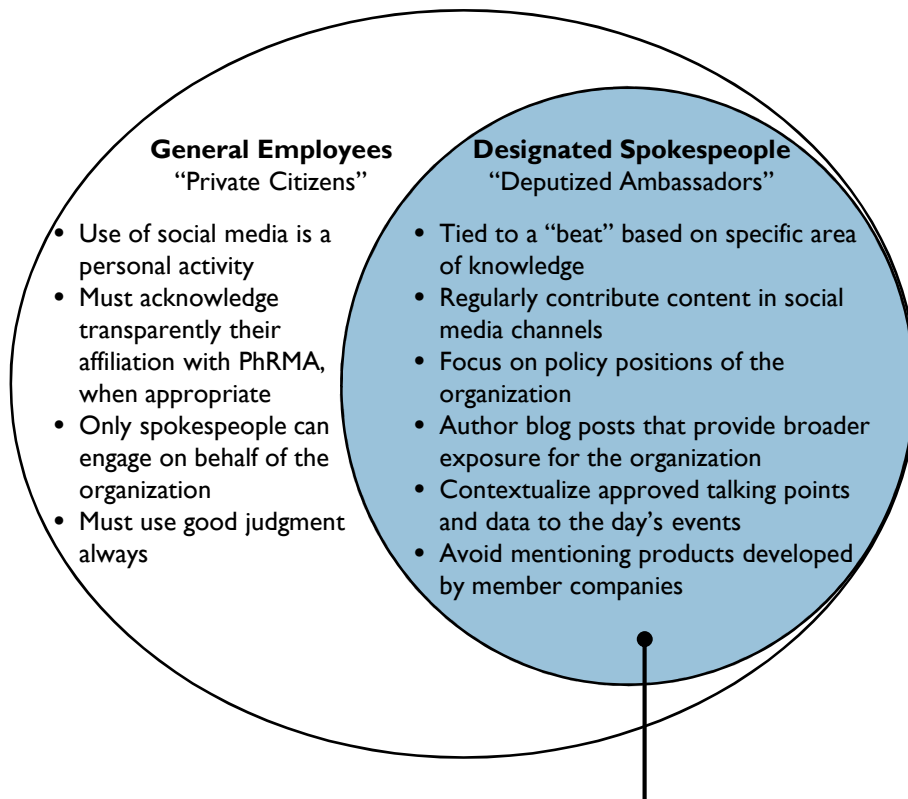


Validating and Humanizing Organizational Positions

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

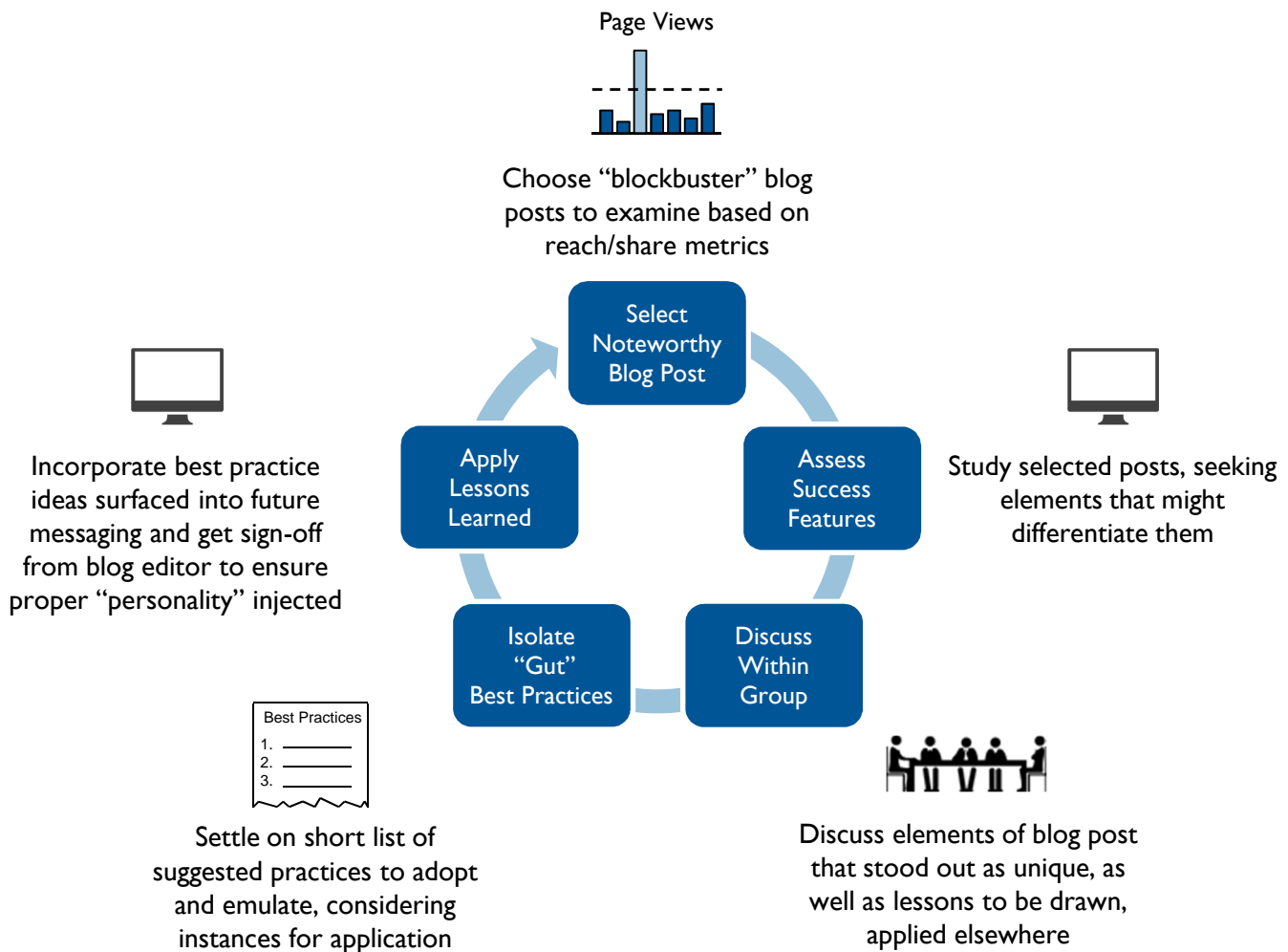
Headquarters: Washington DC

- 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

Modeling Effective Voice for the Social Web

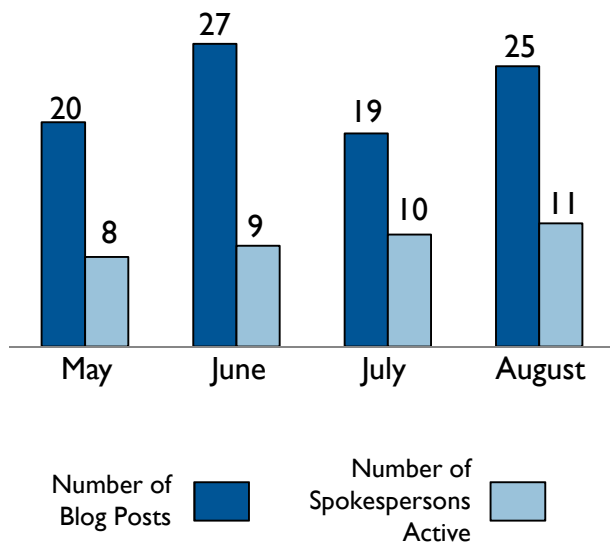
Integrating Best Practices at Regular Intervals

Group Exercise at Training Session



(Efficiently) 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

Leveraging the Investment

Tips for Getting Started

Elements of Successful Program Implementation

Beat Assignments



- Prioritize high-risk, high-opportunity policy areas (start small)
- Selectively choose credible messengers, timely story lines
- Grow team as needs, time, resources permit

Social Media Etiquette



- 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

Group Learning



- 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

Blog-Twitter “Loops”



- Encourage personalized Twitter handles
- Promote blog content on multiple platforms of value to debate
- Speed transition from broadcasting to community-building

Third-Party Content



- 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

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, and struggle to generate sufficient volume and visibility of discussion to break through to casually engaged supporters or potential new supporters who simply lack issue familiarity.

Action: Organization monitors offline and online sources for trending news that can be related to a policy priority. Staff quickly attach previously created, sharable content to relevant discussions in social spaces, with evocative messaging to draw connections and encourage engagement. Procedures related to media monitoring, content attachment decisions, and attachment timing enable resource efficiencies.

Result: By attaching to already trending issues and topics and entering the conversation at prime moments during the day, organizations can engage in new ways with current network members as well as ensure its relevant messages reach the "line of sight" of potential supporters belonging to other online communities.

Laws of Social Media in Action

- ☐ Community Contribution
- ☐ Transparent Motivation
- ☐ Anonymous Critique
- ☐ Cocktail Etiquette
- ☐ Crowd Arbitration

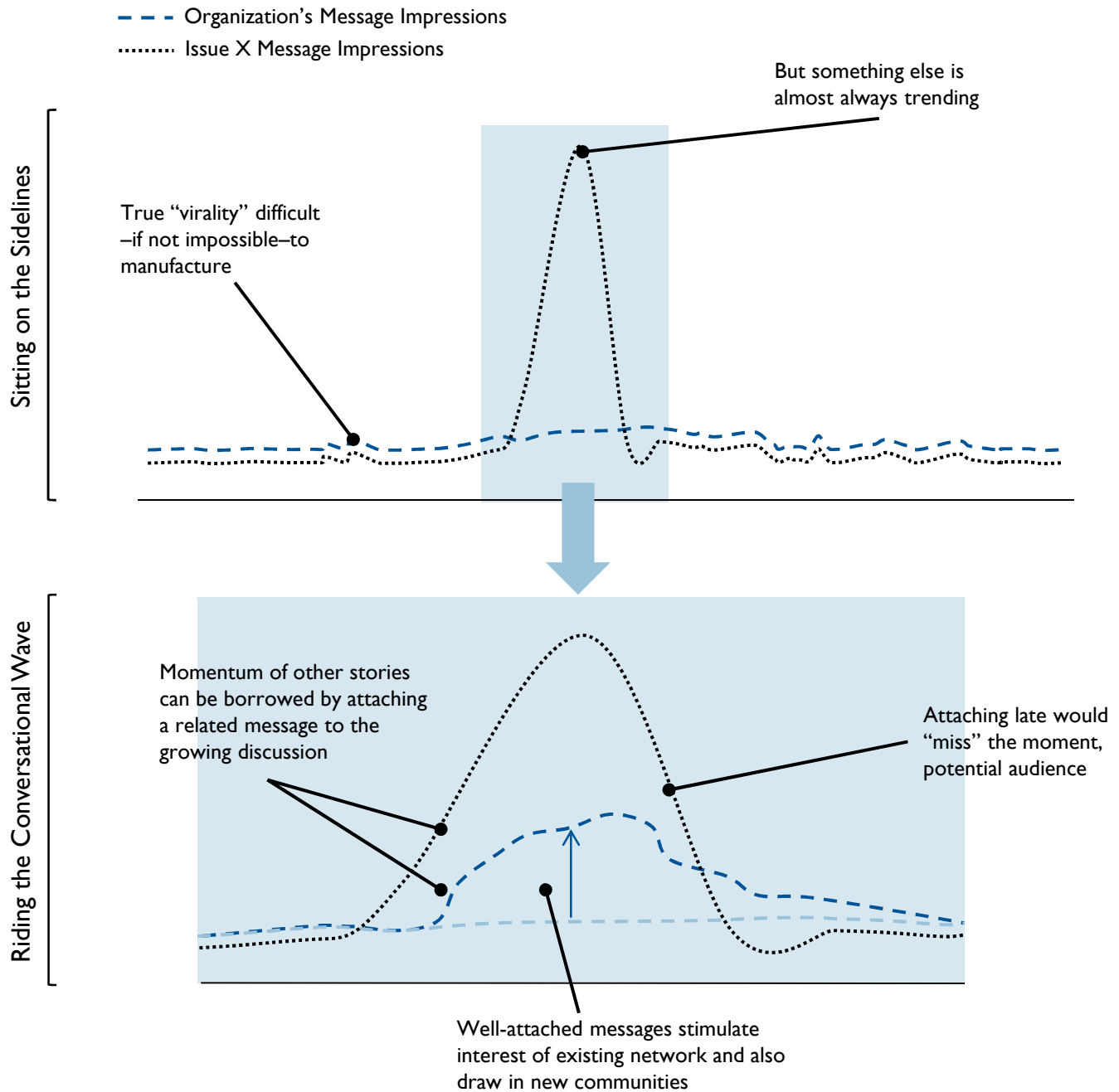
- ☒ Collective Narrative
- ☐ Short Distances
- ☒ Quick Bursts
- ☒ Conservation of (Personal) Energy
- ☐ 'Selfish' Sharing

Possible to Catch Conversational Waves

Borrowing Momentum to Increase Message Visibility

Message Impressions Over Time

Illustrative



Just Don't Do it This Way

Associative Messaging Gone Wrong

**While Attempting to Reach the Millions
Engaged by a Major Movement...**

Kenneth Cole releases
provocative tweet in an
attempt to jack the trending
#Cairo conversation



@KennethCole

Millions are in uproar in #Cairo. Rumor is they heard
our new spring collection is now available online at
<http://bit.ly/KCairo> -KC

03 February 2011

**...The Message Disturbs
Millions More**

**Popular Shoe Company
Officially Makes The Most
Offensive Egypt Tweet**

Business Insider

**Kenneth Cole #Cairo
Tweet Angers the Internet**

Mashable

**Kenneth Cole Steps in It
on Twitter**

Ad Age

**Kenneth Cole Tweet
uses #Cairo to Promote
Spring Collection**

Huffington Post

Assessing Your Position

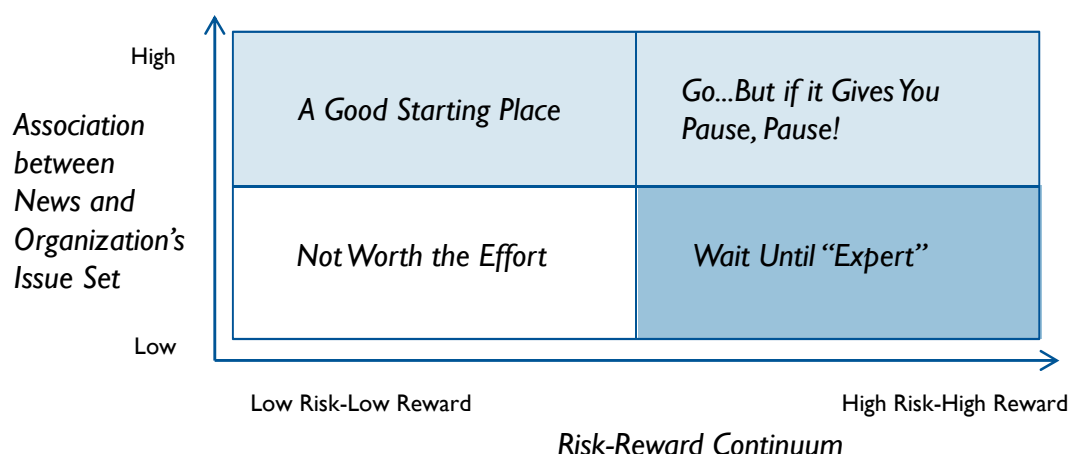
Self-Tests for Determining Whether or Not to Newsjack

The Critical Quiz for Any Emerging “Media Moment”

	Yes	No
• 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 <i>also</i> tasteful (and gentle)?	_____	_____
• Do we have credible, appealing, shareable content that makes our organization a plausible conversation partner?	_____	_____

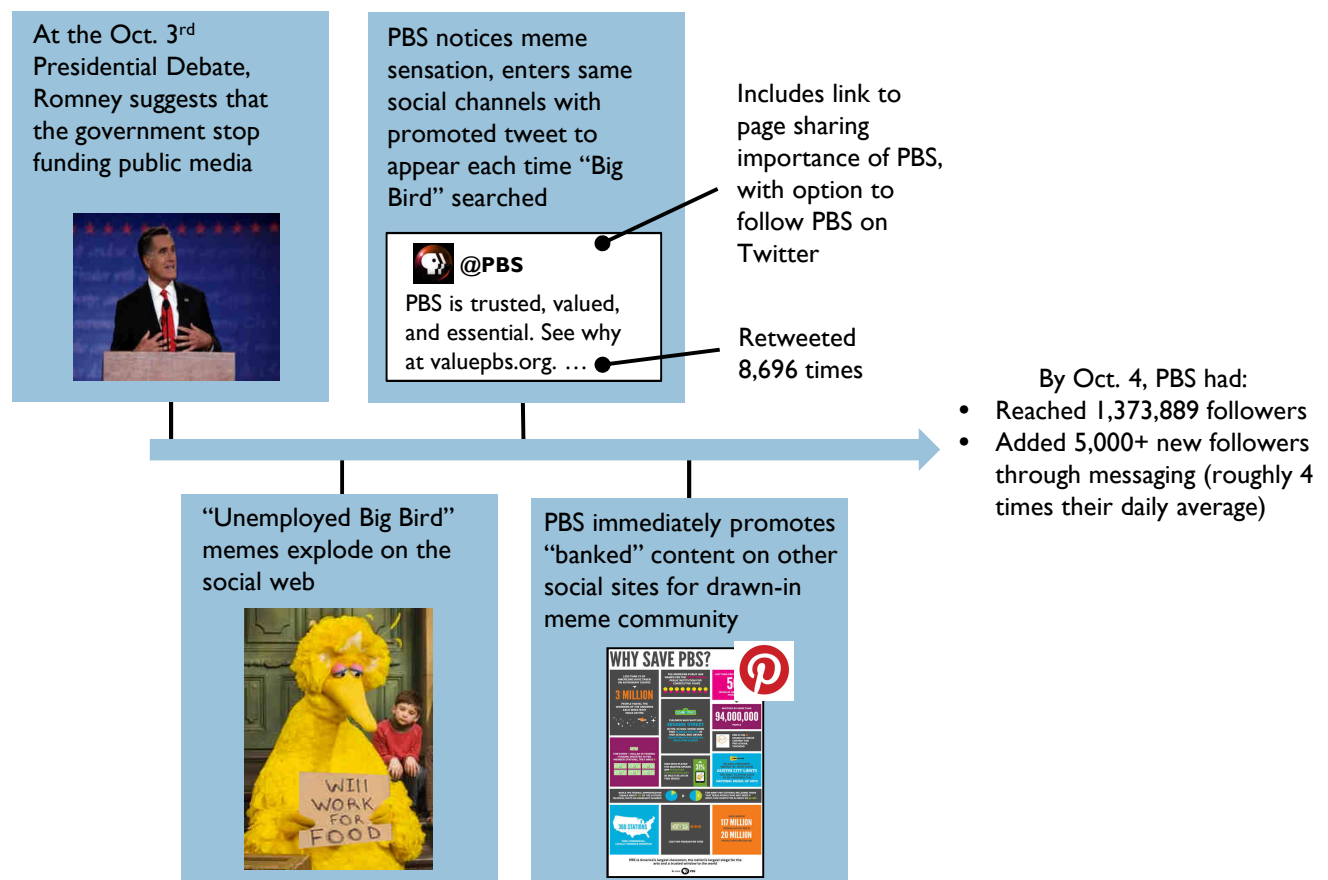
If “No” to any of the above questions, do not attempt a newsjack

Zones of Comfort for a Particular Newsjacking Situation



Big Bird Gets It Right

Safer Bets at PBS



Source: Forbes, 2012; Zipmeme, 2012; @PBS, 2012; National Journal Membership Research interviews and analysis.

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

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



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 in senior-approved approach without requiring senior-level input.

Situation: Even while 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 developing a strategic response to every such situation, investing a great deal of time and resources to defusing negative commentary and preventing fallout. Recurring internal debates about how to manage responses add to organizational investment and can reach levels of unsustainability.

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 is based on effective past response decisions, as well as accumulated learning about right conversational tone and community roles in social spaces. Borderline cases 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 exit from the resolution process.

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

Trouble Sleeping

Time Increasingly Devoted to Extinguishing Social Media “Fires”

High Levels of Executive Anxiety...

From: Association CEO
Sent: 2:08AM
To: VP of Communications, VP of Membership, VP of Government Affairs, Director of Communications, Marketing Manager, Social Media Manager

Can you update me on how we’re handling the discussion in our LinkedIn group?

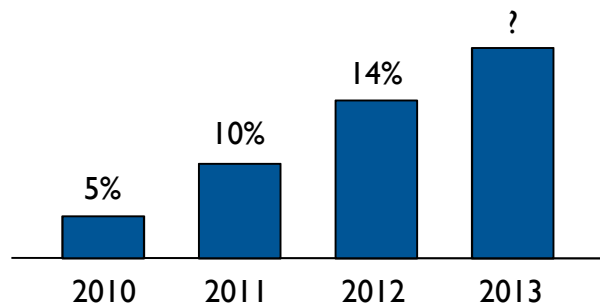
I saw some really inflammatory comments that make me feel like we’re under attack—this could be disastrous for our brand and members if we don’t manage it well.

Please clear your calendars, and let’s meet to discuss how to treat this first thing tomorrow morning.

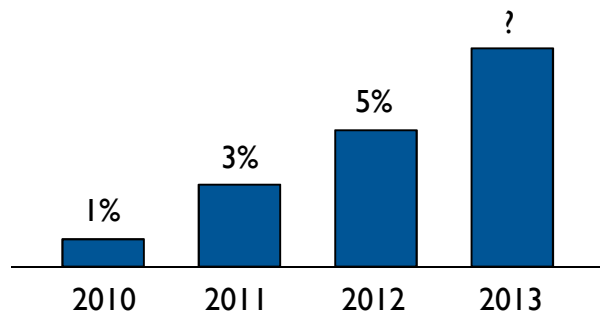
Thanks. CEO

...with No End in Sight

Percentage of Social Media Manager Time Committed to Social Media “Fires”



Percentage of Executive Time Committed to Social Media “Fires”



* Incremental investment (in addition to full-time social media staff) at one organization studied
Source: National Journal Membership Research interviews and analysis.

Committee Blessing

Allowing Executives to “Let Go”

Flowchart Principles

- 1 Respond promptly to clear breaches of policy—especially those with legal implications—to check true-risk situations
- 2 In other cases, first allow community policing, which 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

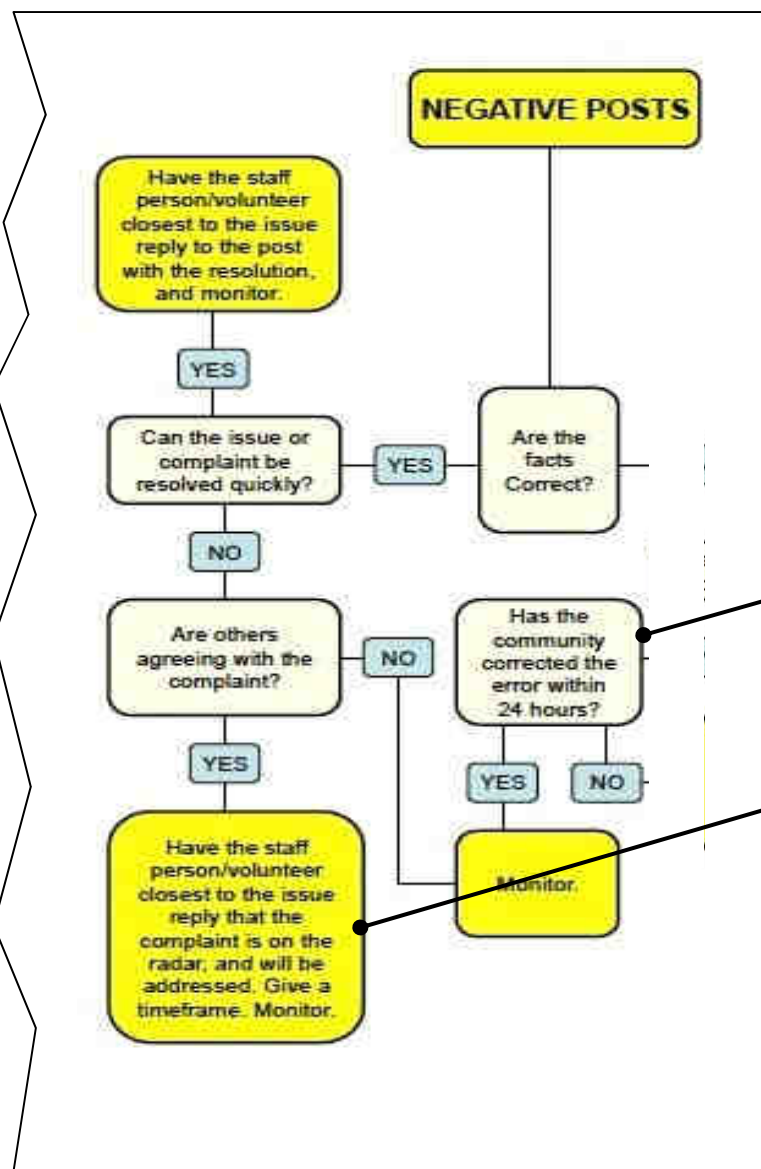


Profiled Organization:
American Society of Civil Engineers

Organization Type:
Professional Association

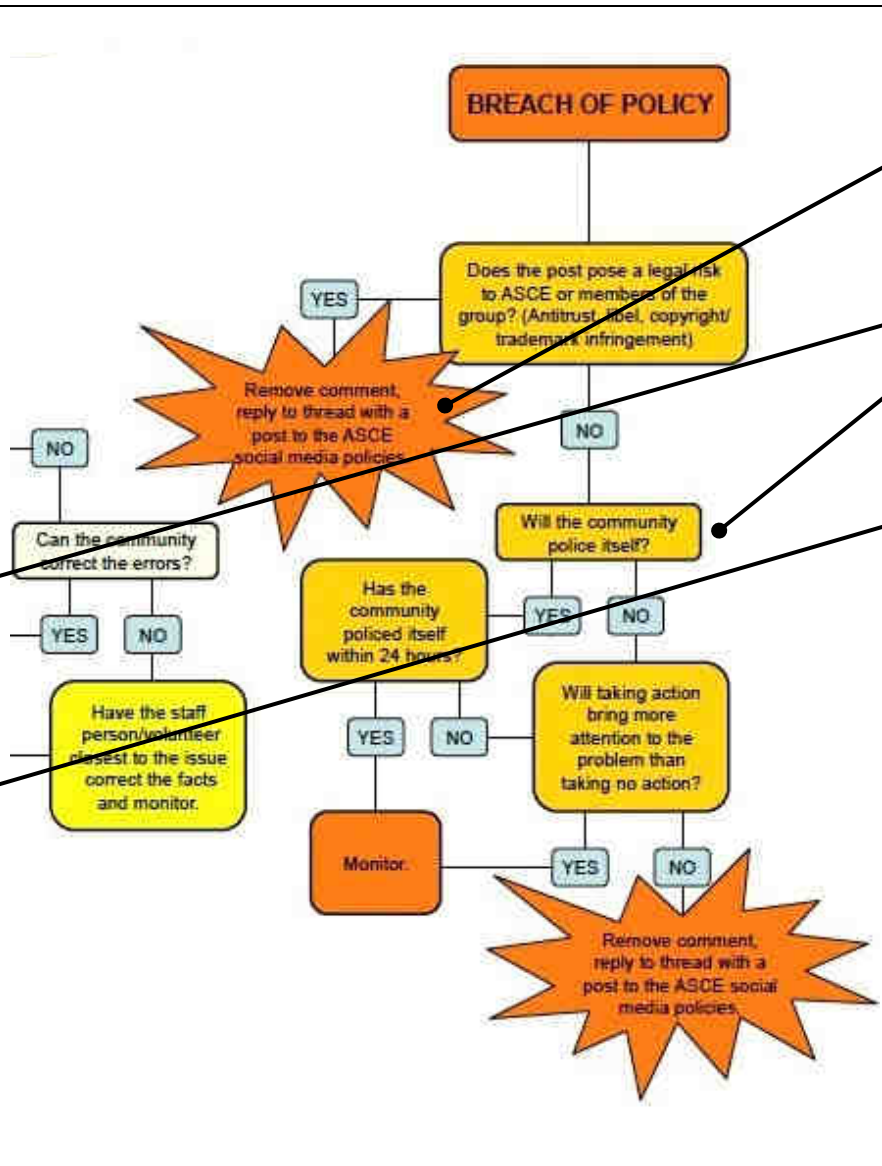
Headquarters: Reston, VA

- 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



Absent Committee Input

without Raising Organizational Risk



Principle 1 in Action:

Act swiftly if the issue runs the risk of snowballing into a more critical challenge or runs into legal issues

Principle 2 in Action:

Before taking action, “pause” to see if community will defend the organization or, ideally, resolve the controversy on its own

Principle 3 in Action:

Find the best messenger in the organization, not simply the most expedient or the most senior

Additional Tips for Hardwired Organizational Response

Tone: Respond in a tone that positively reflects on the organization and its mission

Sourcing: Reinforce your response by citing sources such as URLs and articles

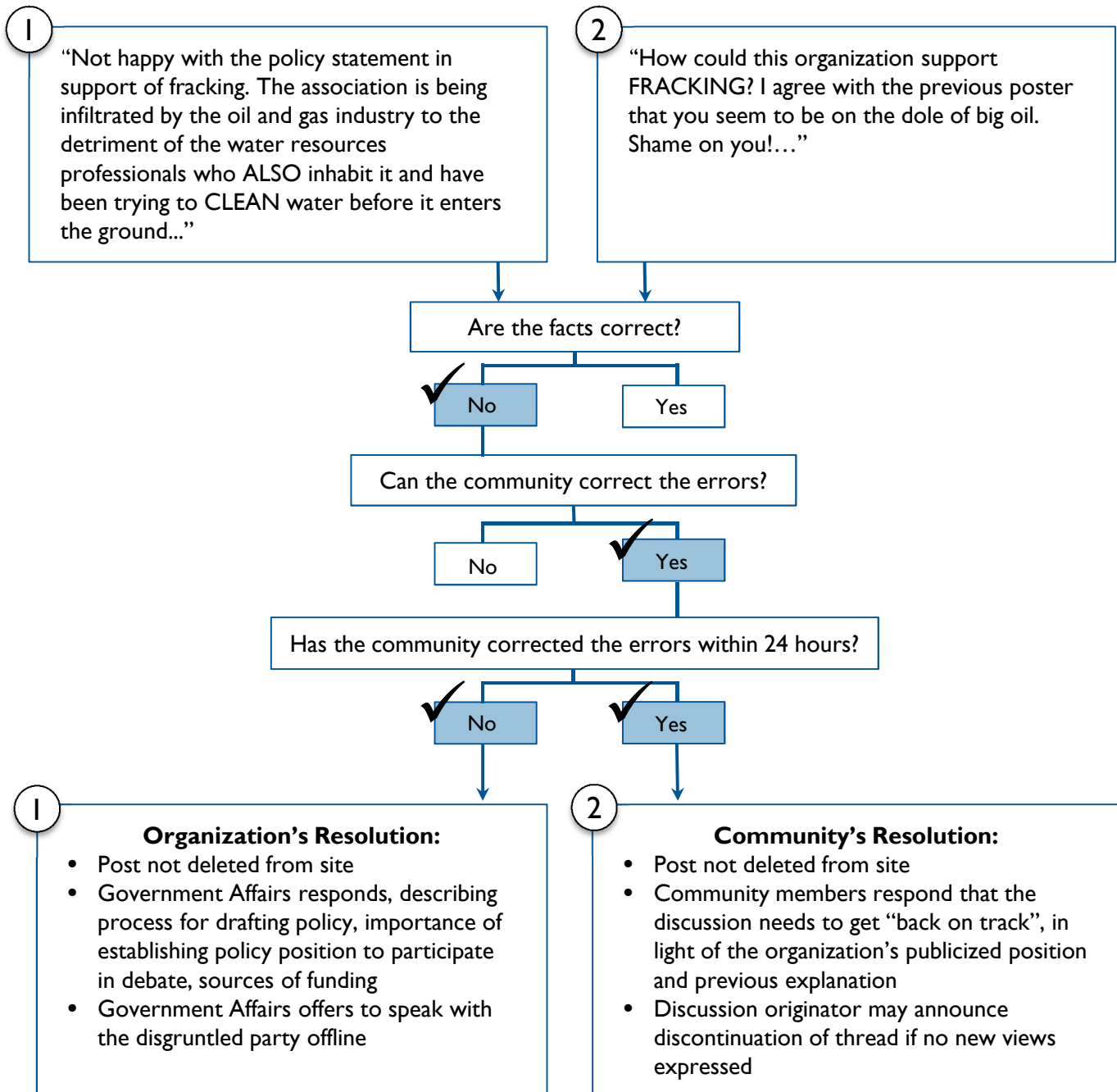
Platform: Focus on responding to the most active and relevant social media sites

Presence: Acknowledge comments, even those that express dissenting opinions

Giving the Community a Chance

The Pathing of Two Negative Posts

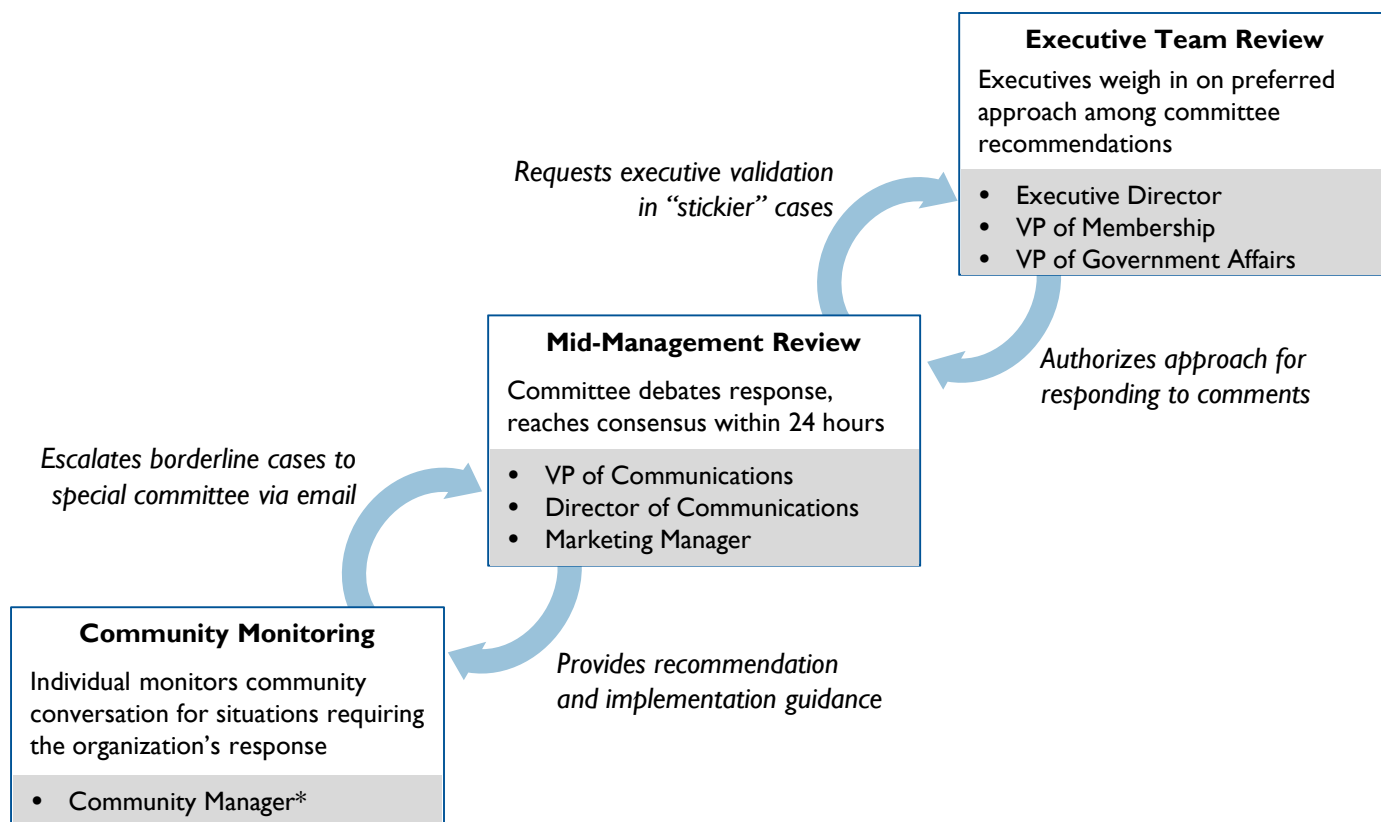
Fictitious Case for Illustrative Purposes



Escalation Process for Borderline Cases

Reserving Executive Time for a Select Few Issues

Escalation Protocol for Questionable Response Scenarios

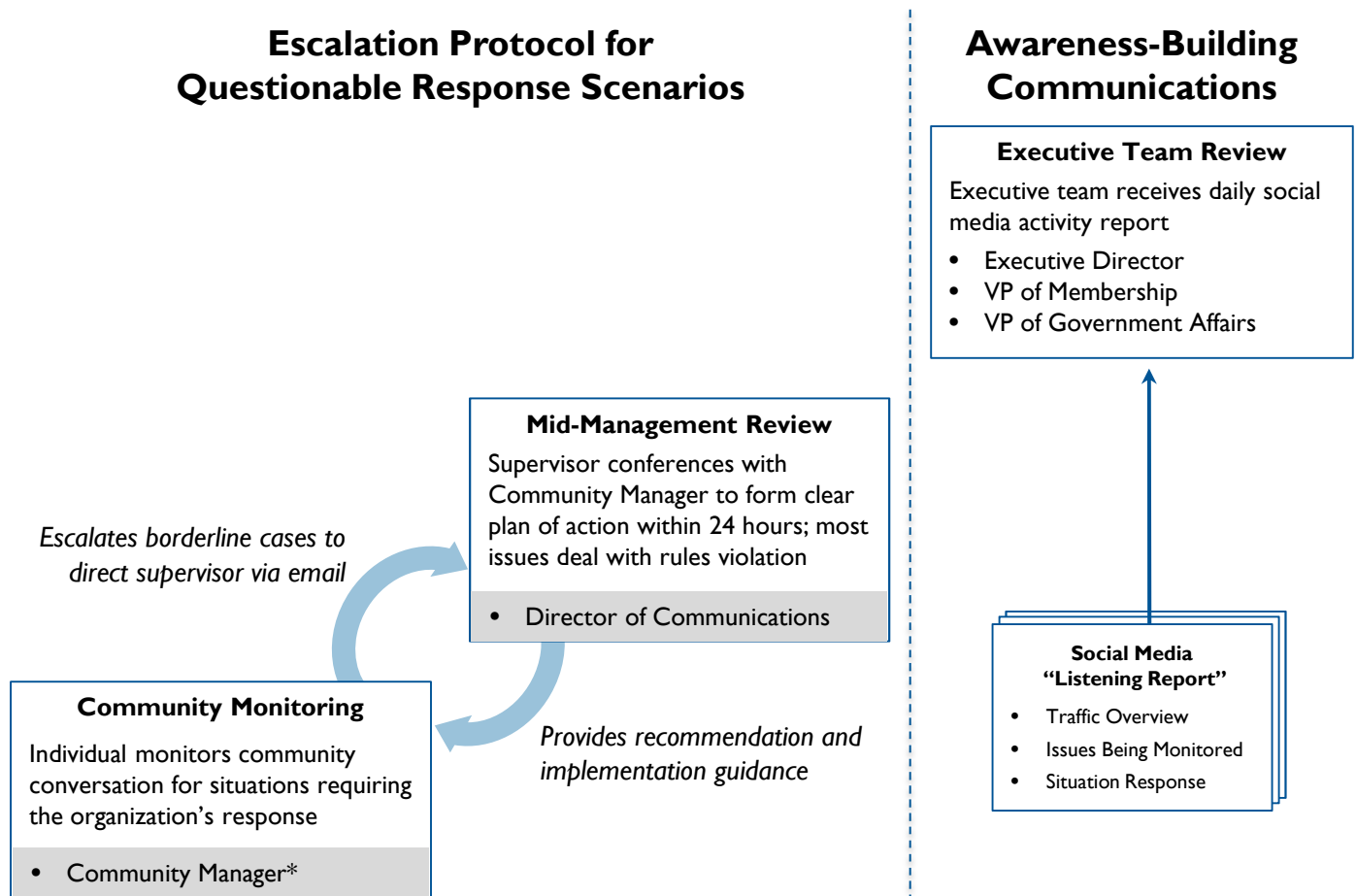


*Role denotes Social Media Specialist

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

Escalation Protocol Modified by Experience

Senior Executives Move from “Involved” to “Informed” Over Time

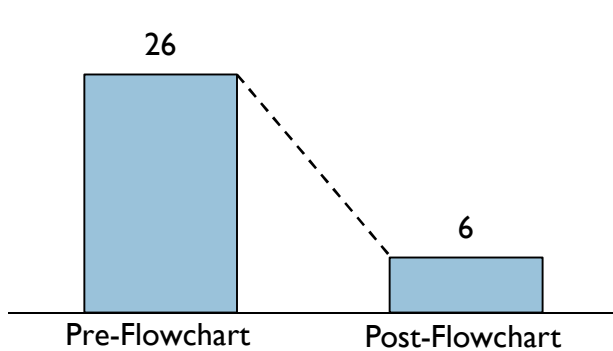


*Role denotes Social Media Specialist

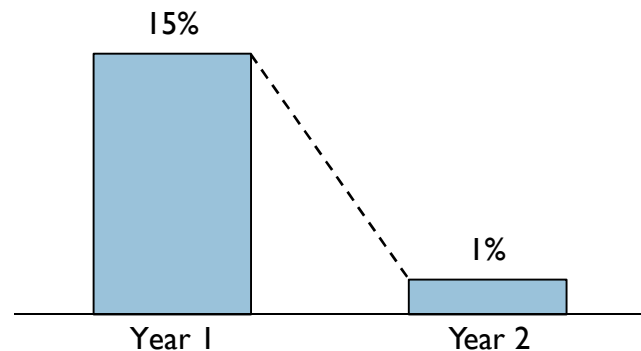
Source: American Society of Civil Engineers; SocialFish; National Journal Membership research interviews and analysis.

Dramatic Decline of Organizational Angst

Number of Issues Escalated to Senior Level Attention
Per Year



Percentage of Issues Escalated Since Formal Escalation Process Instituted



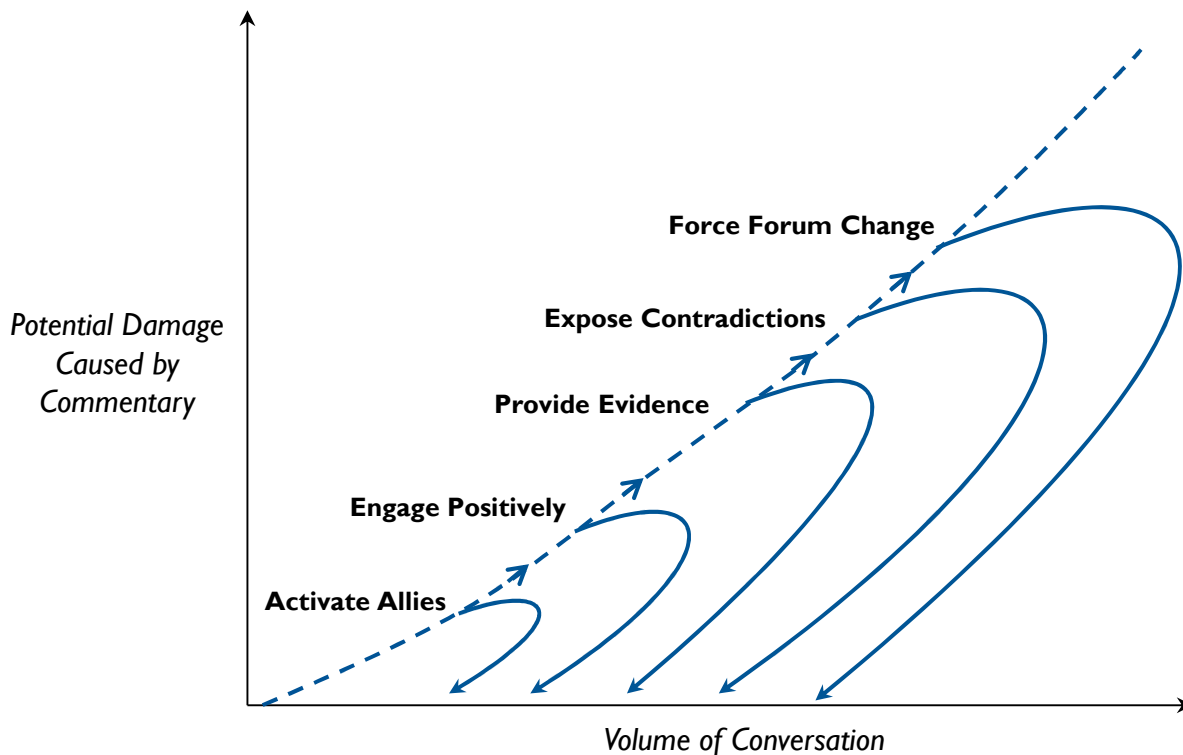
Under Control

“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)

Neutralizing Negative Exposure

Strategies to Defuse Social Media Conversations Before They Crest



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



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

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: While essential legal documents, 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 miss large opportunities to leverage internal stakeholders—often fans who would gladly champion the cause—to amplify policy messages.

Action: Organization creates simple policy, shared in self-explanatory “stoplight” design, that parses acceptable and discouraged forms of social media commentary from staff under the organization's name. Criteria populating 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 audience for the organization's approved content.

Laws of Social Media in Action

☐ Community Contribution

☒ Transparent Motivation

☐ Anonymous Critique

☐ Cocktail Etiquette

☐ Crowd Arbitration

☐ Collective Narrative

☒ Short Distances

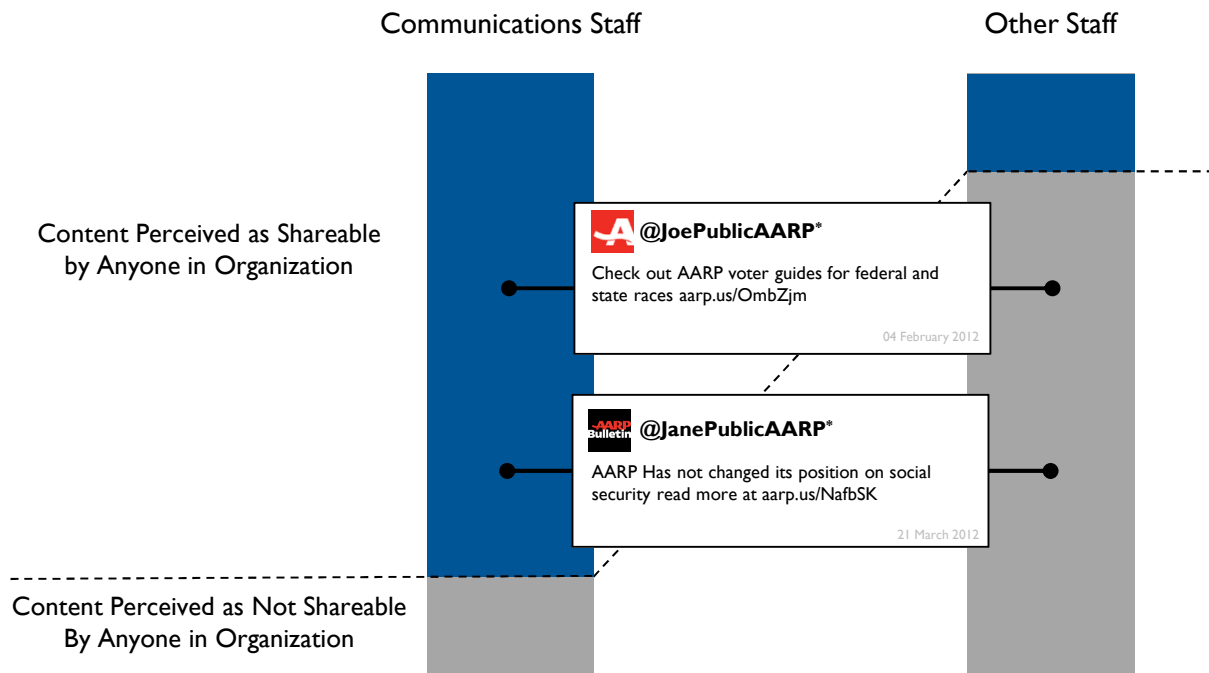
☐ Quick Bursts

☒ Conservation of (Personal) Energy

☒ 'Selfish' Sharing

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

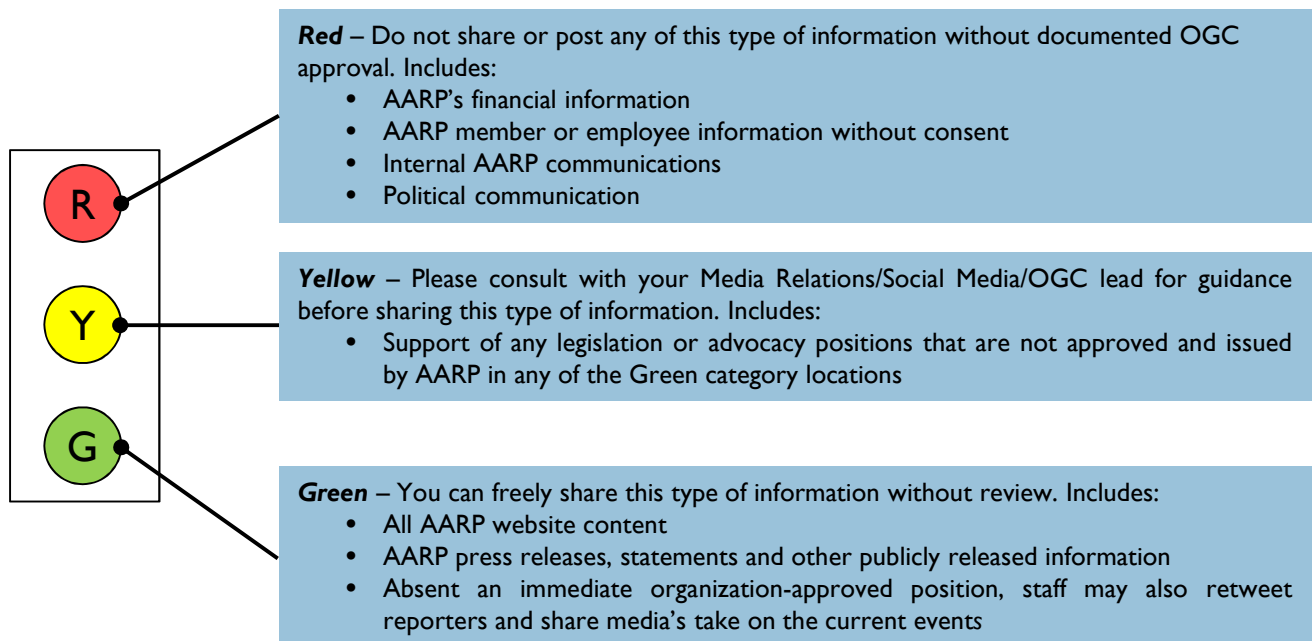
*Illustrative

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

Laying the Foundation for Online Sharing

Organization-wide Policy Clarifies Approved Content

AARP's Stoplight Communications Protocol for Staff



Note from National Journal Membership

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.

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



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.

Re-Enforcing Social Media Participation

Creating an Environment that Encourages Sharing

AARP's Online Platform

Message of the Day*

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



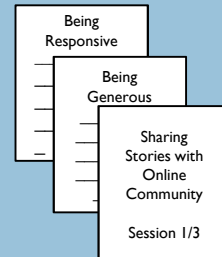
@AARP
The @ AARP #voterguide is out! Go to <http://aarp.us/Ocz87H> & enter your location for yours. RT to help us get the word out, would ya?
24 August 2012

Repository of "Ever-Green" Content

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

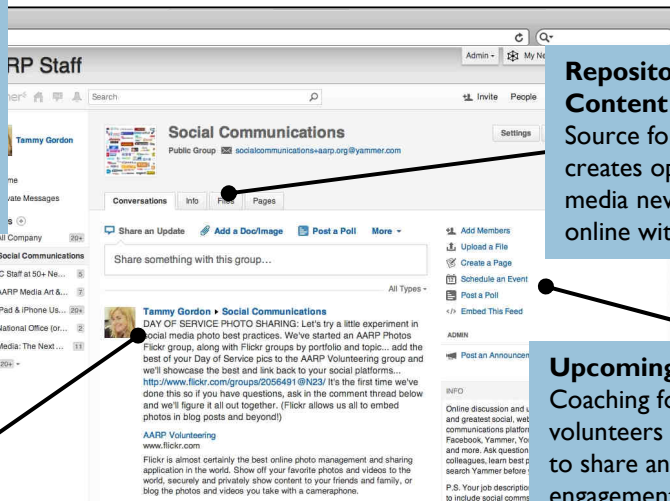
Upcoming Training

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



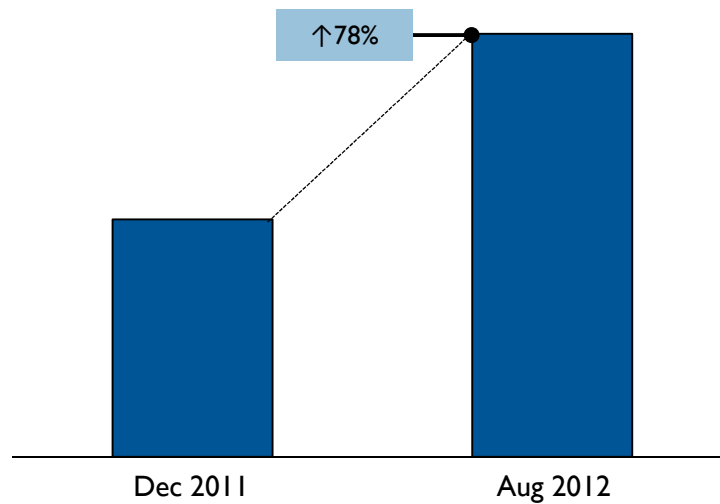
*Illustrative

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

Super-Charged Organizational Reach

Employees Carry Message to Many New Communities

Network Reach
As Measured in Volume of 2nd Degree Followers¹

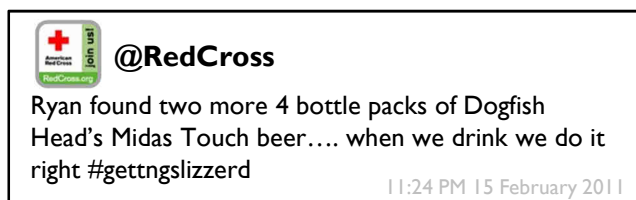


¹2nd degree followers refers to followers of the organization's followers
Source: AARP; National Journal Membership Research interviews and analysis.

Authenticity Strengthens *Honest, Lighthearted Response to*

Faux Pas

A late-night personal tweet mistakenly posted from the American Red Cross account is blasted to over a quarter-million followers



Organizational

The Social Media director quickly deletes the mistweet, acknowledges the mix-up, and spends the next three hours monitoring the situation online



Time

Concerned colleagues make midnight calls to the Social Media director, whose Blackberry begins "blowing up" with messages about the error



Key Lessons for Strategic Online Engagement

- ☑ Exhibiting Transparency
- ☑ Acknowledging Mistakes
- ☑ Utilizing Humor
- ☑ Thanking Supporters

Source: Chronicle of Philanthropy; images by the Noun Project; National Journal Membership Research analysis.



Follow us on Twitter @NJMembership
#NJSocialMediaSummit

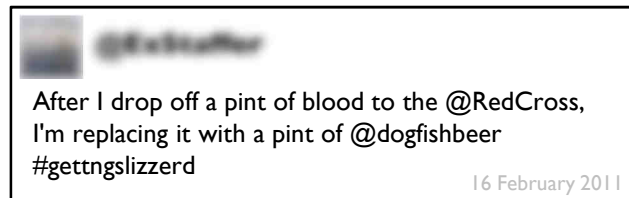
Social Media Presence

“Mistweet” Elicits Support

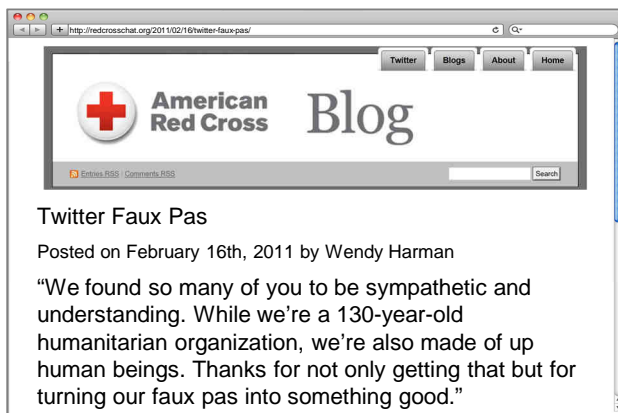
Response

Community Response

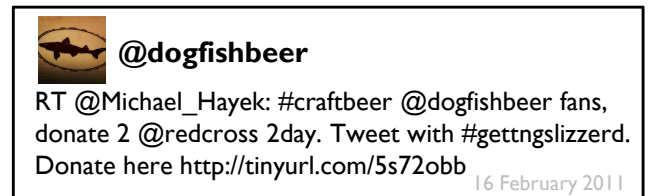
Response is overwhelmingly positive and encourages new donations...



Blogging about the Twitter faux pas the next morning, the Red Cross thanks followers for their support



...including an effort sponsored by Dogfish Head Brewery



“We’re an organization that deals with major disasters that change people’s lives, and we’re always providing aid for people at their lowest point... this was a silly little mistake, so we decided to have a little fun with it.”

Wendy Harman
Director, Social Strategy
American Red Cross



Strengthening Reputation Through Strategic Online Engagement

Key Lessons

Positioning Opinion to Get Noticed

- #10: While many have been content with the passive (read “silent”) activities of issue and influence tracking, an increasing number of advocacy organizations are responding to the need to find their own voice online.
- #11: Effective online advocacy organizations reinforce a sense of genuine connection with the 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!).
- #12: 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 background (e.g., subject-matter expertise) will increase the likelihood of their acceptance in social environments.
- #13: 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.

Defending Against Social Media Attacks

- #14: The most obvious danger presented by the social realm 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.
- #15: 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.
- #16: 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.



Empowering Staff members for Impact Advocacy

- #17: When organizations seek to empower employees broadly—to speak as “fans” (rather than “ambassadors”) that 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.
- #18: Defying the efforts of even the best-prepared organizations, content breaches will inevitably occur; experts here advocate immediate public transparency, apology if necessary, and a dash of humor if appropriate.

Source: National Journal Membership Research interviews and analysis.

The New Tools

Lessons for the Policy Community from

	Surfacing Risks and Opportunities Through Social Media		
	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	#1 The Beginner’s Toolkit: Smart Dashboard Construction <ul style="list-style-type: none"> Key issue trends Stakeholder sentiment analysis Heuristics for predicting policy shifts 	#2 Influencer Ecosystem Mapping 	#3 Specialized Spokesperson Roles  #4 Newsjacking

Source: National Journal Membership Research interviews and analysis.

of Advocacy

the First Wave of Social Media Adoption

Strengthening Reputation Through Strategic Online Engagement

IV. Defending Against Social Media Attacks

- Holding fire when assaulted 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



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 supporters at all levels of the engagement spectrum—not just the most-impassioned—can be activated.

Situation: Organizations frequently miss opportunities to attract and leverage the help of passive and latent supporters by providing and promoting only engagement options that appeal to the most invested advocates—time-intensive, resource-intensive “asks”.

Action: Organization assesses various clusters of supporters—given their levels of interest in the organization’s causes and capacities to “invest”—and the characteristics of individuals in those clusters. Based on findings, the organization creates a broad range of advocacy options, including options thought to appeal to each cluster. In as many cases as possible, the organization specifically looks for ways to make supporter involvement as easy as possible.

Result: By adding to the list of engagement options and appropriately tiering calls to action based on community characteristics, advocacy involvement grew among 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 |

Source: National Journal Membership Research interviews and analysis.

Calls-to-Action Not One Size Fits All

Low-Friction Engagement Options Drive Community Giving

Philippines Typhoon Crisis (2009)



Call the American Red Cross to contribute

Haiti Earthquake Crisis (2010)



Call the American Red Cross to contribute



Text 90999 to contribute \$10 to earthquake fund

"[Despite the Red Cross trending on Twitter following the typhoon] there wasn't a single uptick in donations... It was sound and fury, signifying nothing. [In the case of the Haiti, however,] people weren't just tweeting, they were taking action — they were texting to donate. We raised \$3 million in 48 hours, \$10 at a time."

Wendy Harman
Director, Social Engagement
American Red Cross

Case in Brief



American Red Cross

Profiled Organization: American Red Cross
Organization Type: Non-Profit

Headquarters: Washington DC

- Provides a wide variety of intensity engagement options
- Promotes options in multiple online spaces and social platforms
- Supplies links and tips to facilitate engagement

Source: "Online Giving, One Person at a Time," *New York Times*, November 10, 2010; Philippines Typhoon photo credit to Cross Catholic Field Blog; Haiti earthquake photo credit to Monon's Geography Blog; images from the Noun Project; National Journal Membership Research analysis.

Creating an Experience of Advocates' Choosing

Making It Easy to Assume Value-Added Roles

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

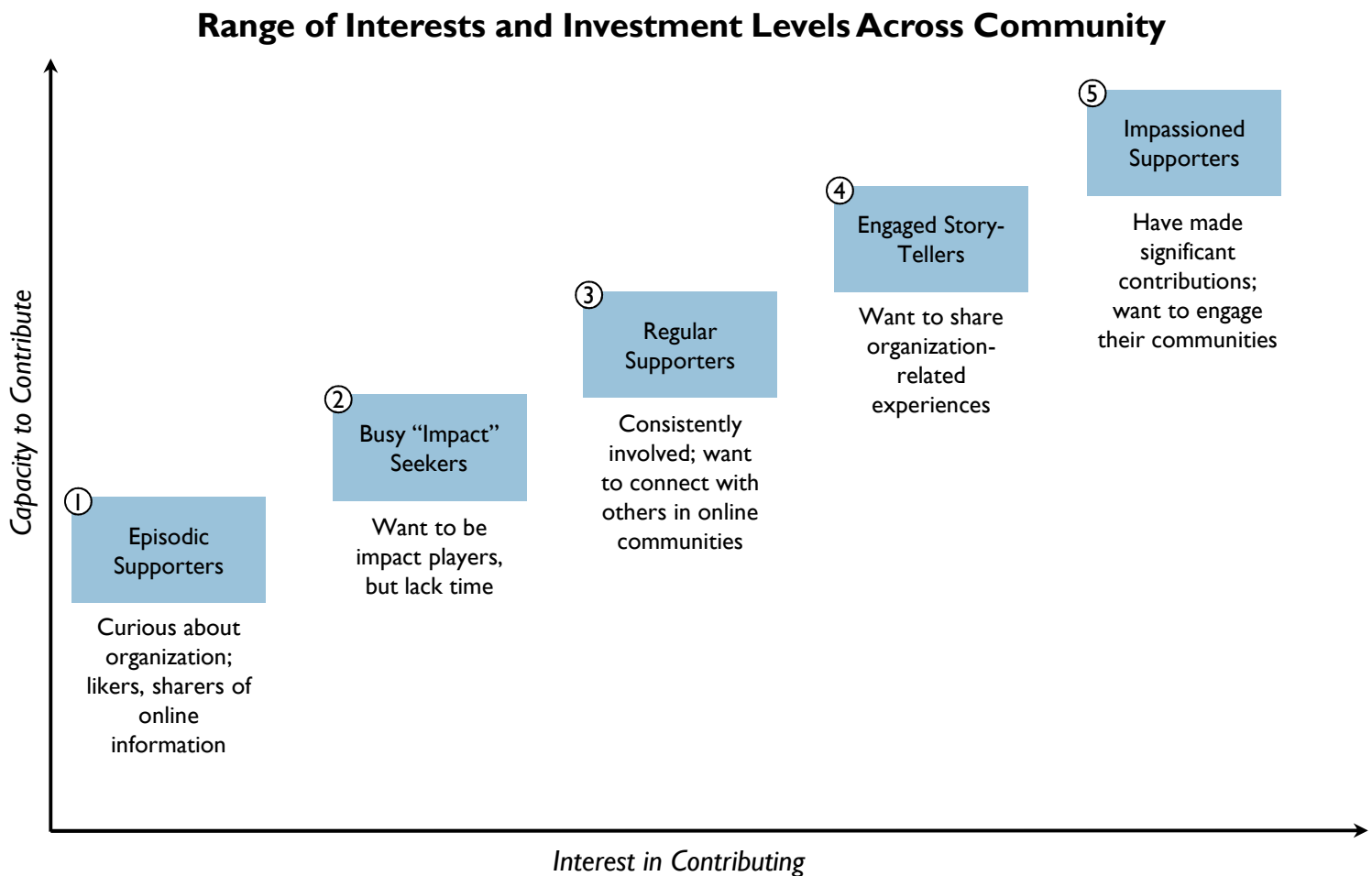
Easiest-ask engagement options appear higher on list

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



Understanding How Online Supporters “Cluster”

An Illustrative Example – Composite from the Research



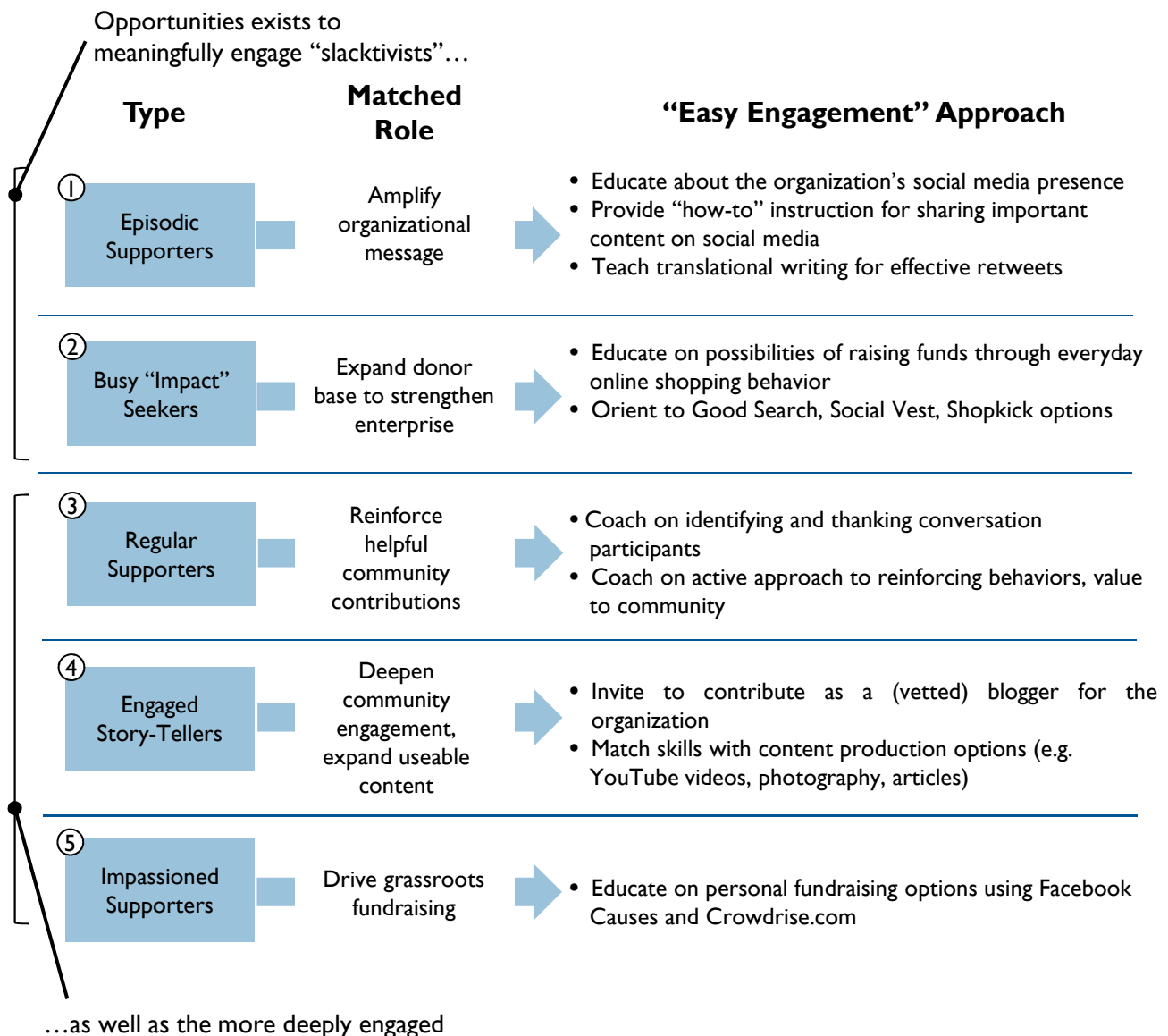
Source: National Journal Membership Research interviews and analysis.



Follow us on Twitter @NJMembership
#NJSocialMediaSummit

Removing Barriers to Online Action

Meeting Advocates at Their Level



Encouraging Ongoing Stewardship

- ✓ **Recognition:** public “thank you”s on social channels
- ✓ **Information:** up-to-date material on how contributions are supporting the organization’s mission
- ✓ **Support:** sharable training materials for select advocate roles

Challenges to Credibility of Digital Advocacy

Many Policymakers Bemused by Social Media Discourse

For “Slacktivism” Only

“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 at all compelling. Honestly, if you don’t care enough to make a real argument, I don’t care enough to pay attention.”

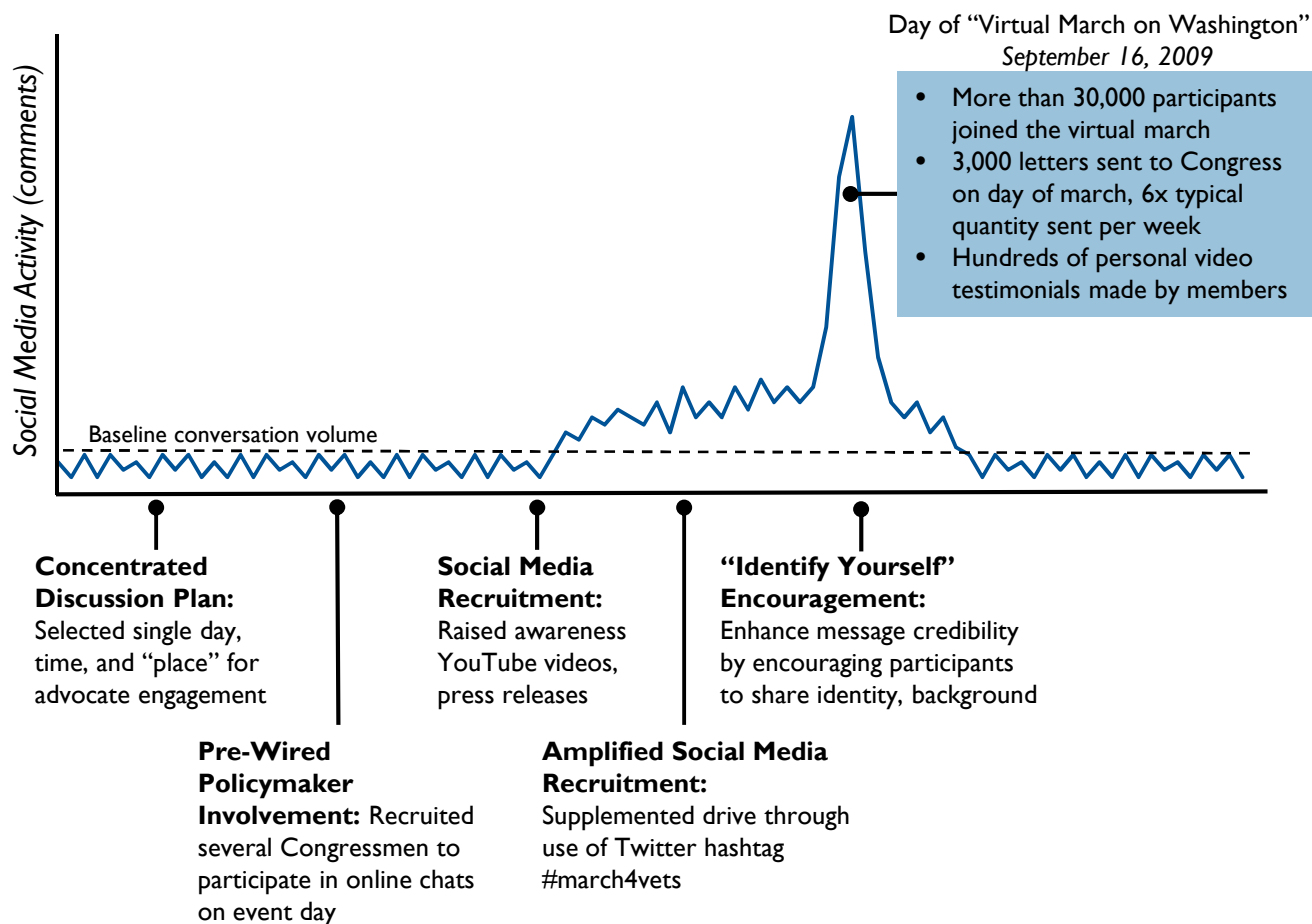
With Whom Am I Speaking?

“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.”

Demonstrating More than Passive Interest

Orchestrating a Virtual March on Washington

Facebook Activity around Disabled Veterans 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

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 process vastly expands the pool of banner-carrying supporters.

Situation: Many advocacy organizations are always on the hunt for grasstops advocates, but relying on the current base of supporters largely limits candidates to individuals who have already opted-in to these roles; it can be difficult and time-consuming to convert today's passive supporters to tomorrow's active supporters. Efficient approaches to finding latent (not passive) high-impact supporters through new technologies abound, but are often unknown or under-appreciated.

Action: Organization uses social media mining and select placement of promoted advertising to collect and solicit stories from individuals that would likely connect with the organization's cause at a values level. Connections lead to interested individuals' sharing of personal details and experiences with the organization, including basic demographic information and story details. A follow-on vetting process of individuals with the most impressive personal stories is deployed by the organization to progressively (and efficiently) engage the highest-potential grasstops advocates—individuals who are likely to engage and also have the cachet to strengthen the organization's policy messaging.

Result: Re-designed advocate recruitment yielded a large pool of new, high-value grasstops leaders. Advocates cultivated under new process responded 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

☒ Community Contribution

☒ Transparent Motivation

☐ Anonymous Critique

☐ Cocktail Etiquette

☐ Crowd Arbitration

☐ Collective Narrative

☒ Short Distances

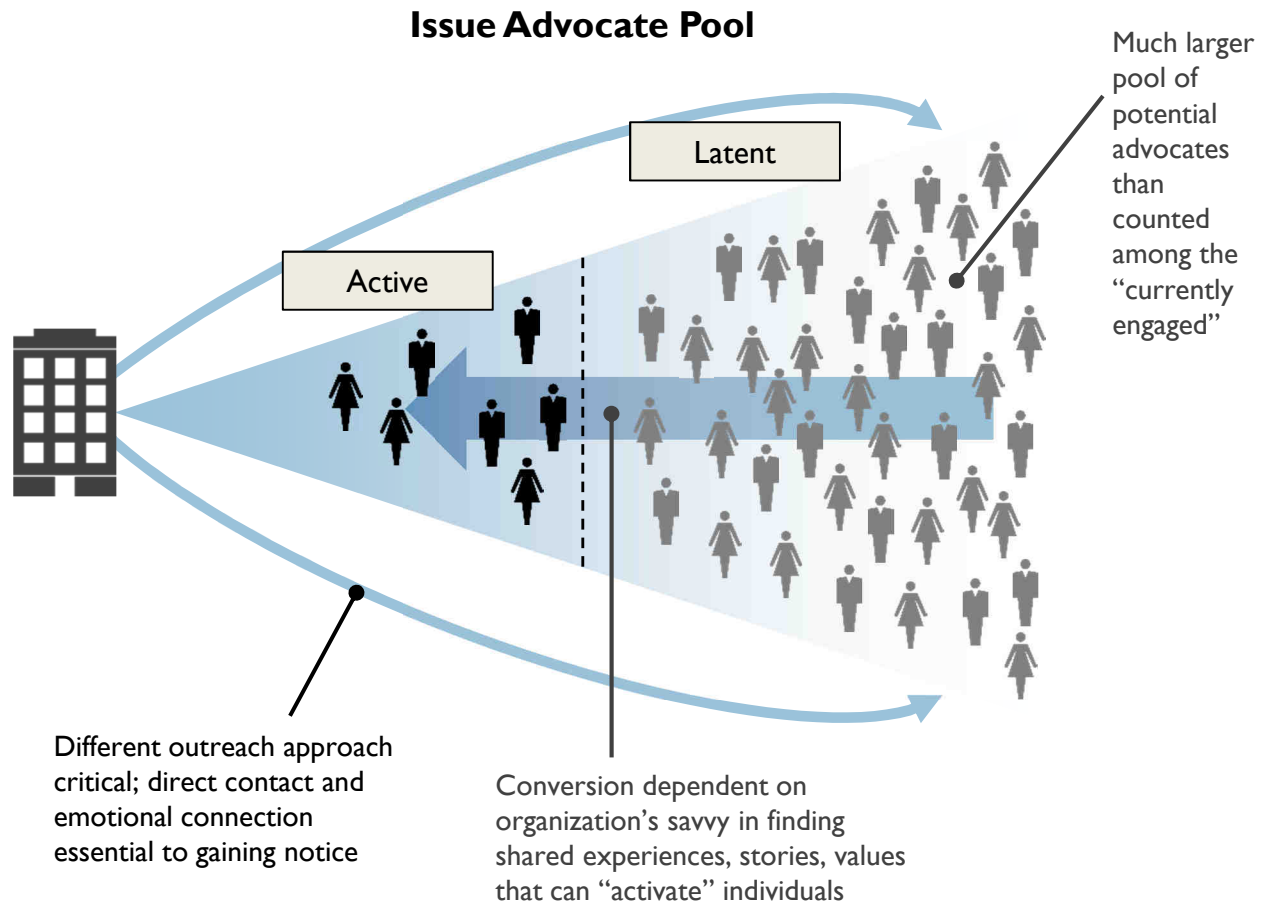
☐ Quick Bursts

☒ Conservation of (Personal) Energy

☒ 'Selfish' Sharing

Widening the Net for Grasstops Advocates

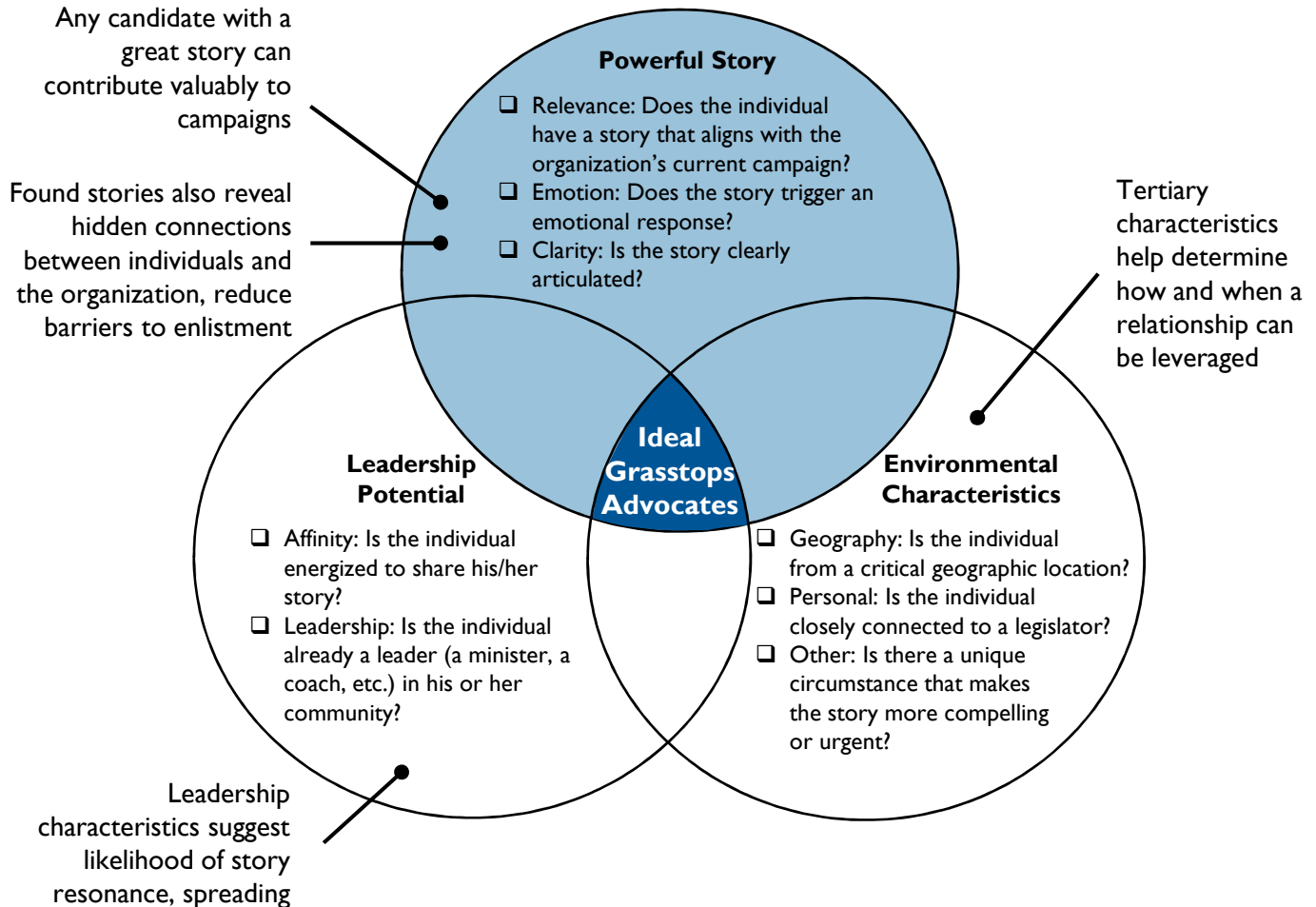
Focusing on High-Potential Individuals



Defining the Ideal Advocate

Keeping the Story at the Core

Search Filter Guiding Candidate Evaluation



Case in Brief



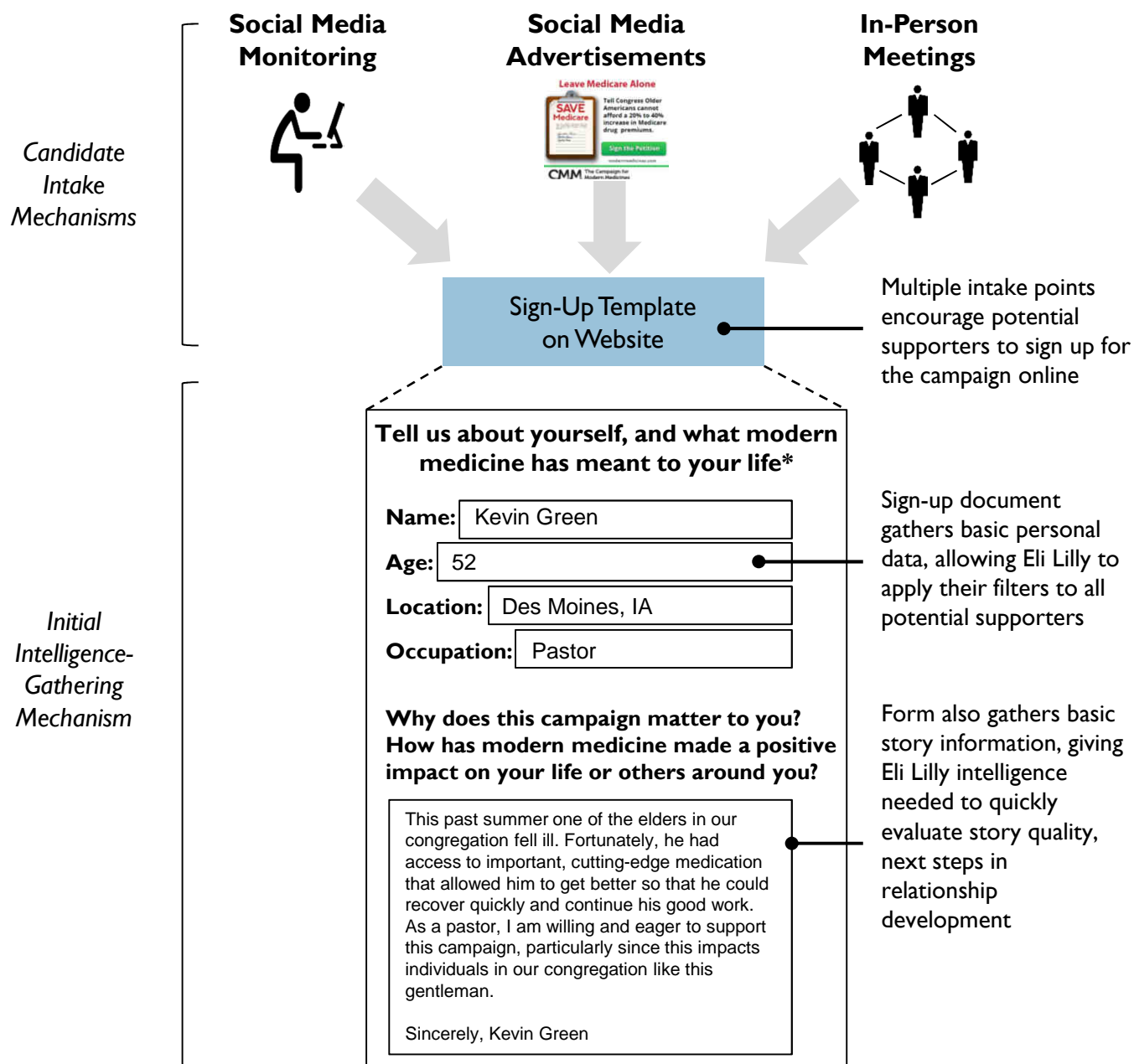
Profiled Organization: Eli Lilly
Organization Type: Corporation

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

Gathering Intelligence on Prospective Advocates

Designing the Intake Mechanisms with Filters in Mind

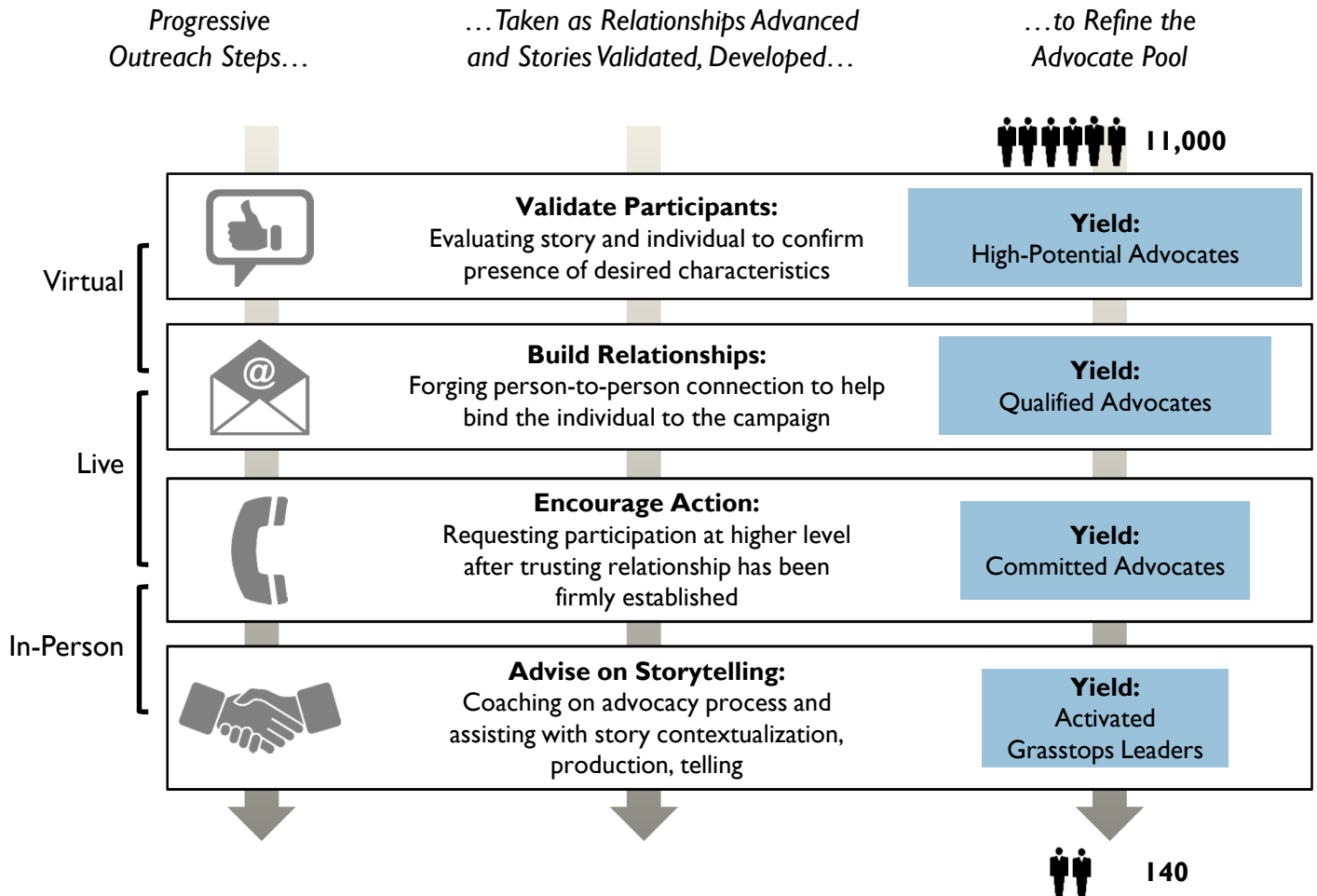


* Details and identity masked.

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

Exploring Relationship Potential

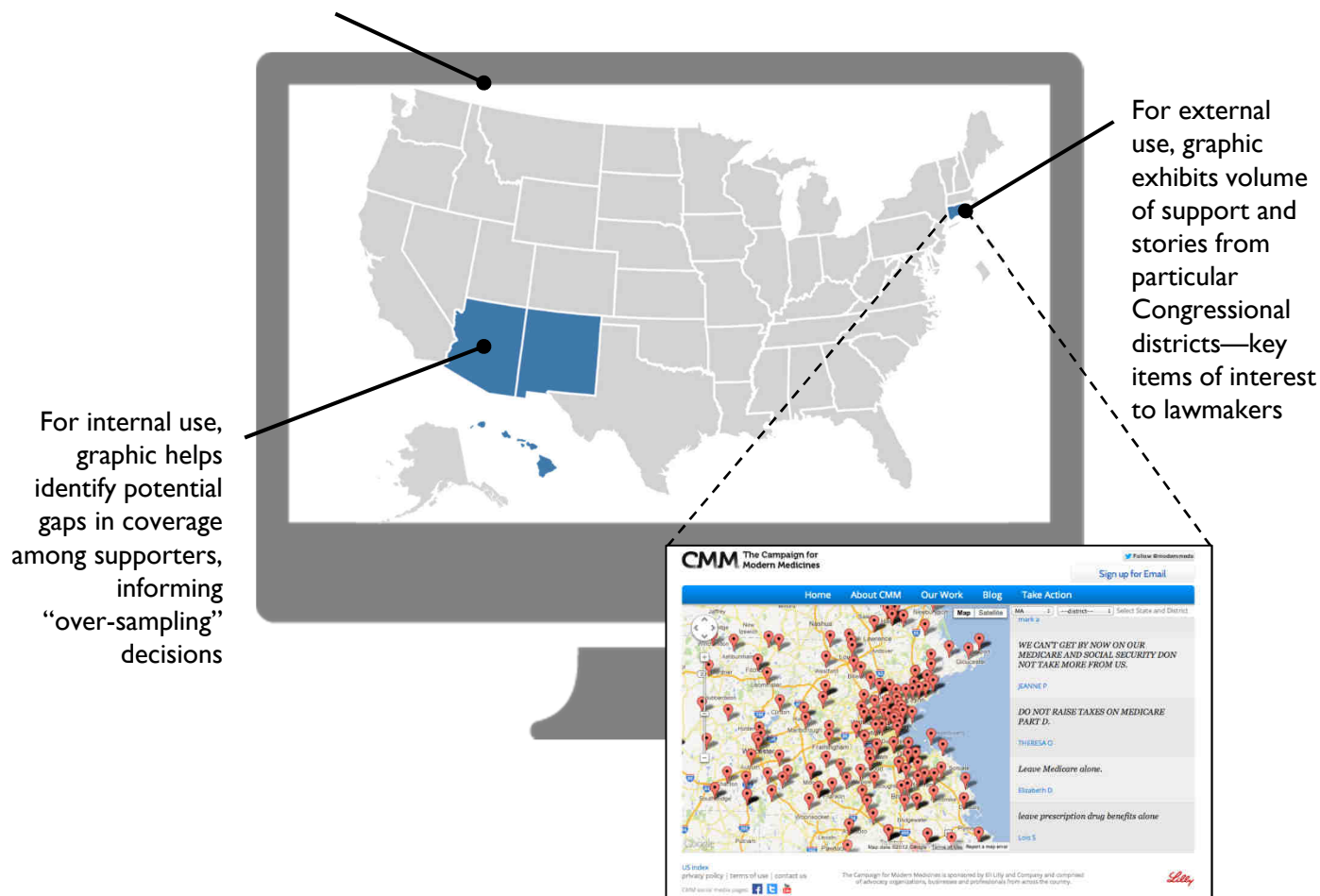
Candidate Vetting and Conversion Process



Powerfully Illustrating Advocate Voice

Visualizing Legislation Support Geographically

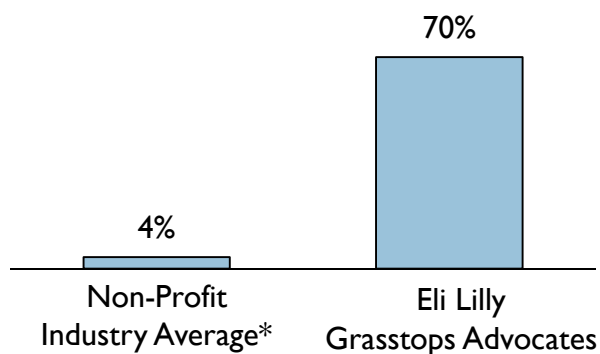
Geographic representation allows quick relay of critical information to internal and external stakeholders



Advancing the Agenda

High Advocate Response Rates

Fans Responding to Call to Action



High-Value Advocate Contributions



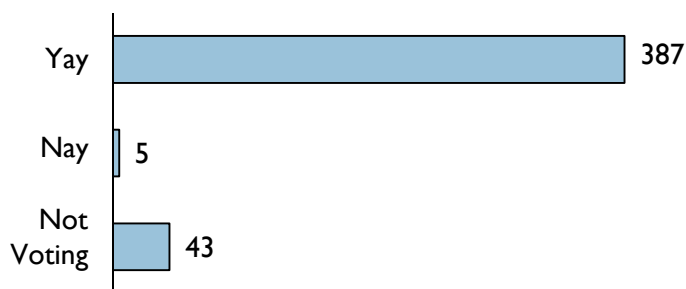
Tablet-friendly videos were created for use in meetings with Congressmen

70 Grasstops Advocate Videos Created

Desired Campaign Outcomes

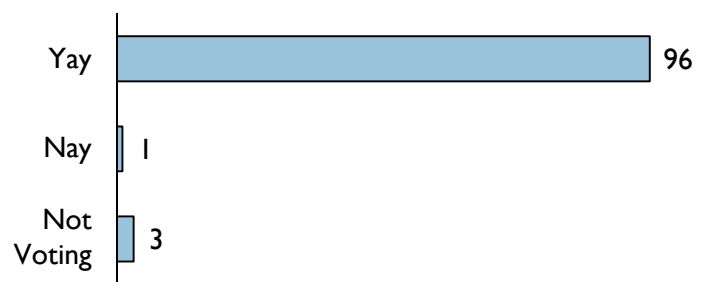
House Vote: H.R. 5651

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.

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 results in participant-generated “impact stories” for use in advancing policy position in policymaker discussions.

Situation: Organizations hoping to solicit valuable community input for policy initiatives in emerging media have (well-founded) concerns around messaging control; community feedback may introduce inconsistencies related to levels and intensity of policy support among constituents, as well as content that runs directly counter to the organization’s policy purposes.

Action: Organization pre-authors “re-tweetables” based on campaign fundamentals, which are shared with (and subsequently distributed by) key aligned stakeholders. Carefully crafted solicitations for crowd stories are then launched into the “prepped field” on the established Twitter hashtag, and a designated social media team filters subsequent online conversation for community-generated content that reinforces the campaign’s policy goals. Goal-advancing community-generated content is then amplified within the ongoing conversation to reinforce desired direction of conversation, stimulate helpful feedback, and encourage sharing of additional (relevant) stories.

Result: Carefully planned and reinforced conversation produced a high volume of engagement, position statements, and new content from stakeholders. Data and stories collected were shared with policymakers and effectively generated lawmaker support for the organization’s primary policy aim.

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

The Hijacked Hashtag

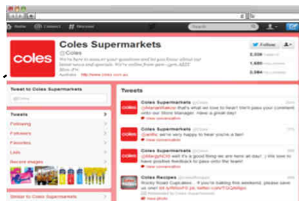
Unmanaged Conversations Risk Going Off-Topic

Attempts to stimulate open conversation...

Coles Supermarket



- Australian supermarket chain
- Sought to generate positive crowd content on Twitter by soliciting shopping stories
- Received unanticipated negative commentary, setting back the marketing effort rather than advancing it



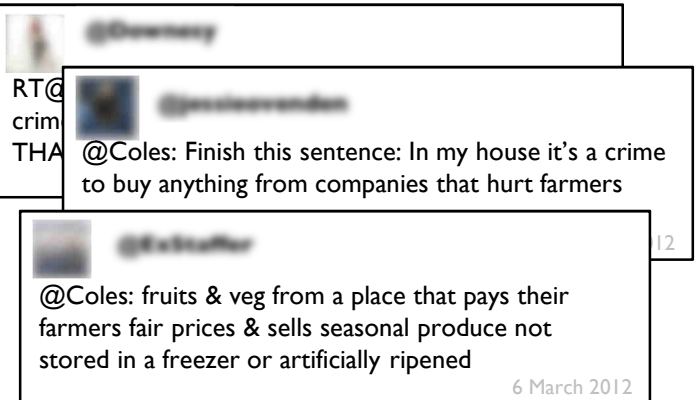
@Coles

Finish this sentence: In my house it's a crime not to buy...

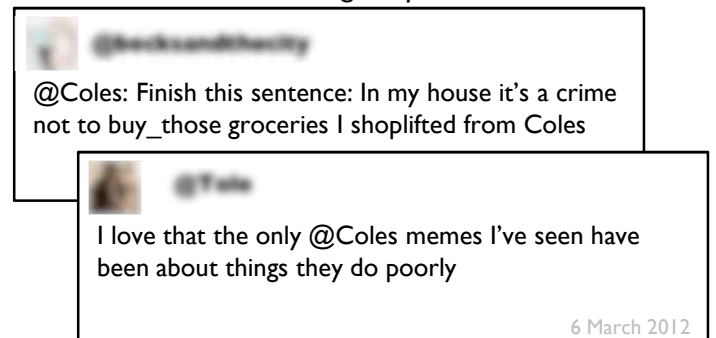
6 March 2012

...can yield undesirable responses

Negative Responses

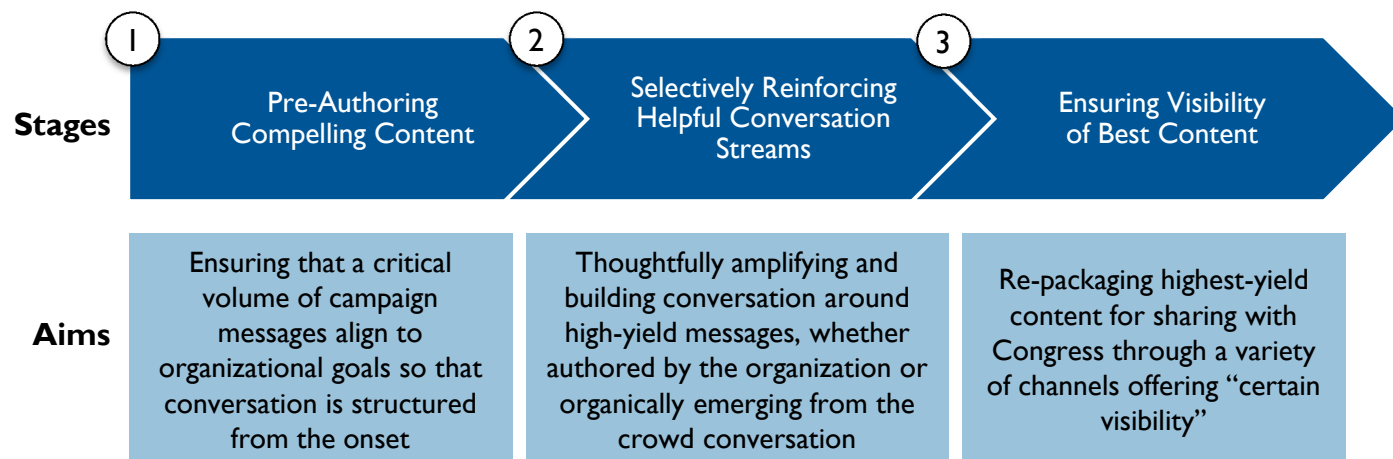


Distracting Responses



Engineering a Higher Yield Conversation

Key Aspects of Campaign Approach



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

Case in Brief



podesta GROUP

Profiled Organization: We Are Golf/Podesta Group **Headquarters:** Washington, DC
Organization Type: Trade Association

- 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

Creating High-Powered Campaign Messages

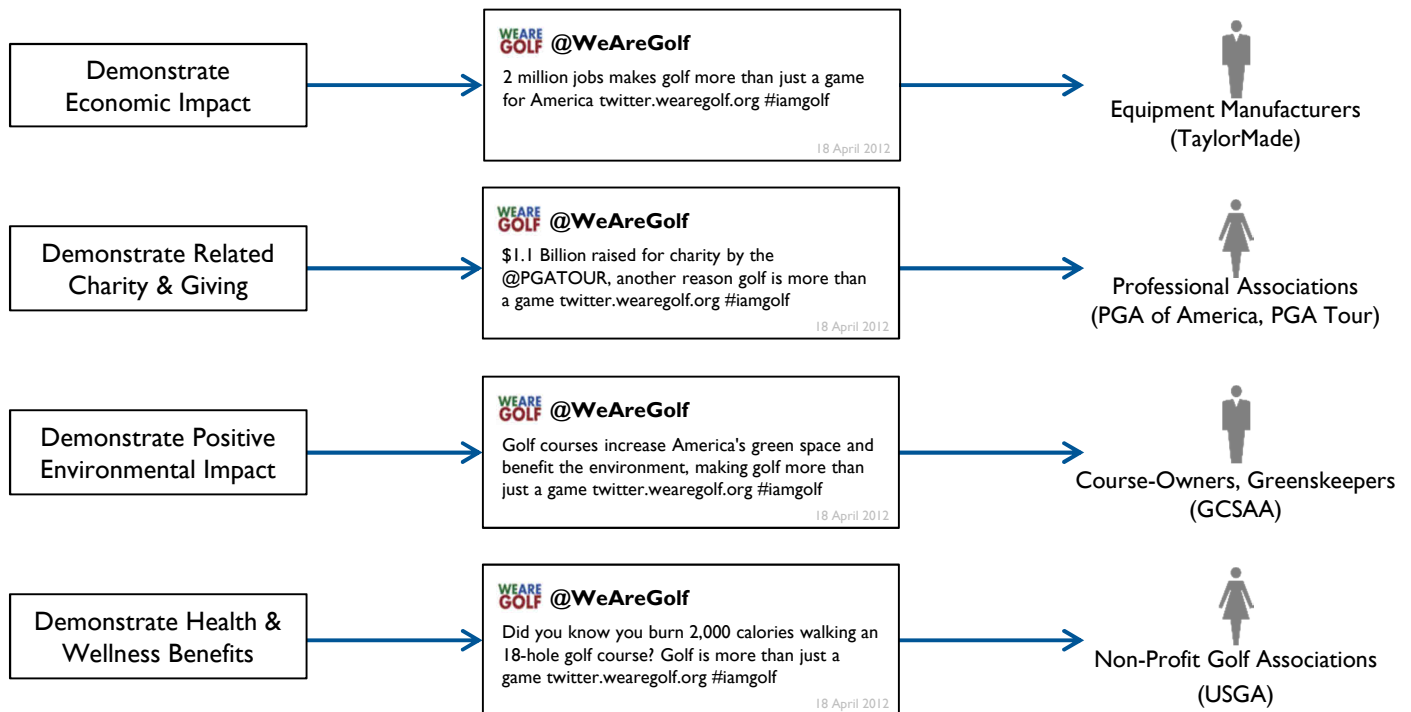
I

Pre-Campaign Diligence to Nurture 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 network



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

Selectively Amplifying Goal-Advancing Content

2

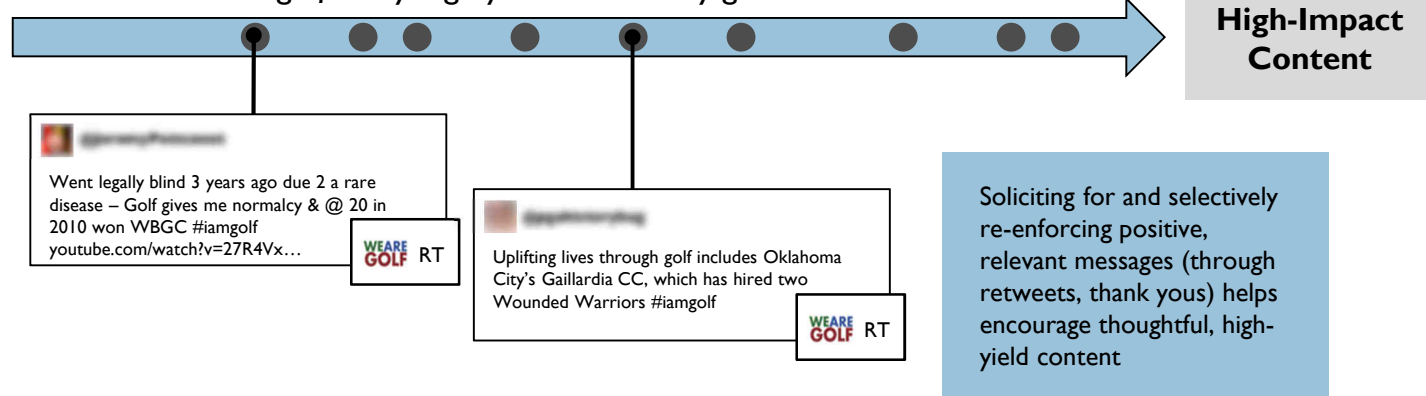
Discussion Management on Event Day

Illustrative

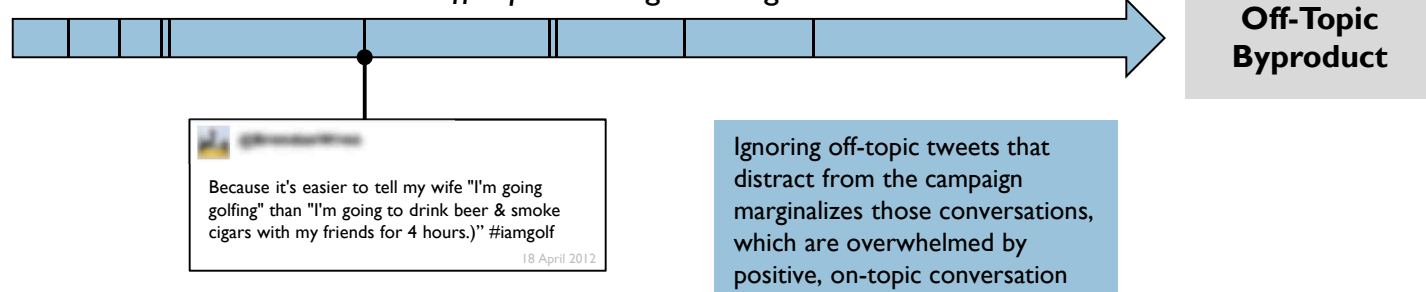
Consistent reinforcement of pre-authored re-tweetables...



...is magnified by high-yield community-generated content...



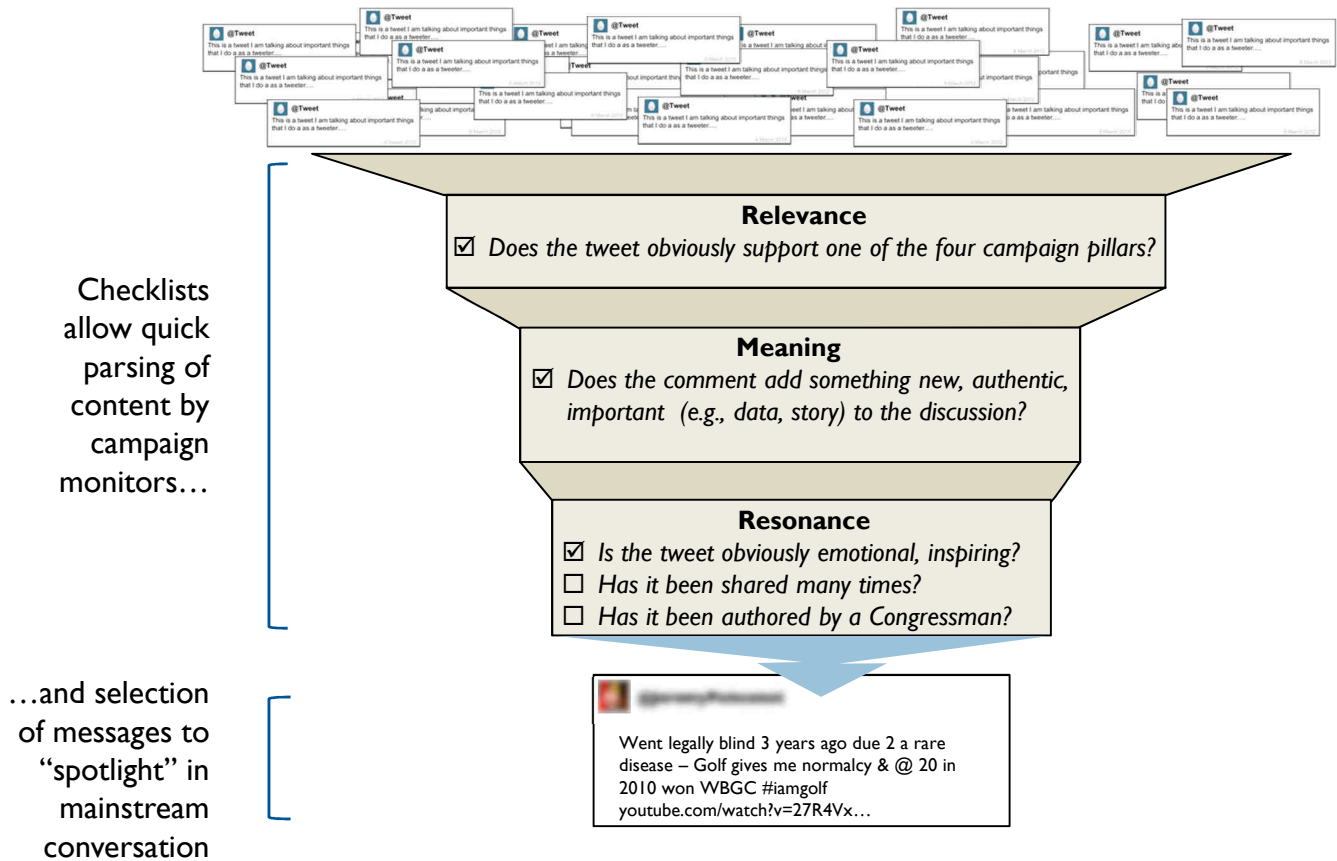
...and off-topic messages are ignored



Filtering Crowd Content for New Gems

2

Process for Sifting and Amplifying New Content



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 were shared directly with Congressmen, showcasing the importance of golf within relevant districts

...when they search the Internet...

Website Posts



Tweets were 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

Achieving Message Coherency

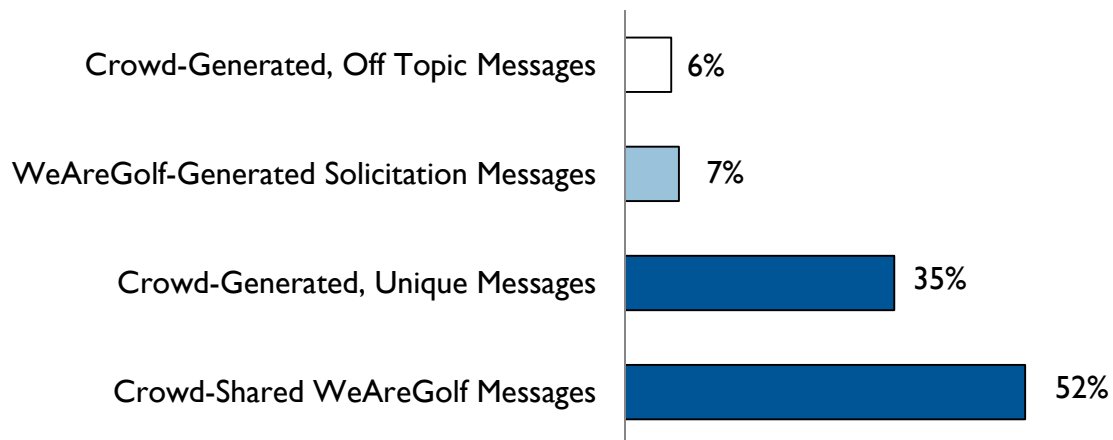
Reaping the Rewards of Organized Conversation

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.

Leveraging Supporters to Maximize Influence

Key Lessons

Extending the Online and Offline Value of External Partners

- #19: Ultimately, one of the most powerful uses of social media for advocacy organizations is building communities sympathetic to their cause; thoughtfully developed and nurtured, these communities can be activated on occasion to display their size and strength to policymakers.
- #20: 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.
- #21: To attract new recruits, the most effective tool 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.
- #22: Valuable Side Benefit: The power of emotionally compelling narratives for use in *offline* conversations is a highly underappreciated aspect of social media's value to advocacy organizations; the ability to bring positions to life in face-to-face settings has tremendous power.
- #23: 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 approaches 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.”
- #24: 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, online petitions, virtual protests, and call-in campaigns remain as powerful as ever at signaling the size and strength of the organization's cause.

Coda



Strategy in the Turns

Ambition in Today's Inquiry

Observed Shifts in the Government Affairs Function

Performance Dimension	Traditional Focus	Emerging Focus
Influence/Reach	Inside the Beltway	Local, National, Global
Scope of Dialogue	One-to-one	One-to-many; many-to-many
Media Strategy	Distribute positions	Build community, pull new/outside supporters into "gravitational field"
Message Propagation	Office-driven, "push"; one-way	Network-driven, "pull"; two-way
Communications Ownership	Highly localized, specialized within organization	General ownership and competence
Engagement	Monitoring	Leading; shaping
Sizing of Support	Contact interviewing, pulse polling	Continuous, multi-modal, precision-targeted
Branding Level	Organization	Organization, individual, stakeholder
Crisis Management (Reaction to Criticism)	Defensive, immediate	Pre-planned, selective, patient

Source: National Journal Membership Research interviews and analysis.



Follow us on Twitter @NJMembership
#NJSocialMediaSummit

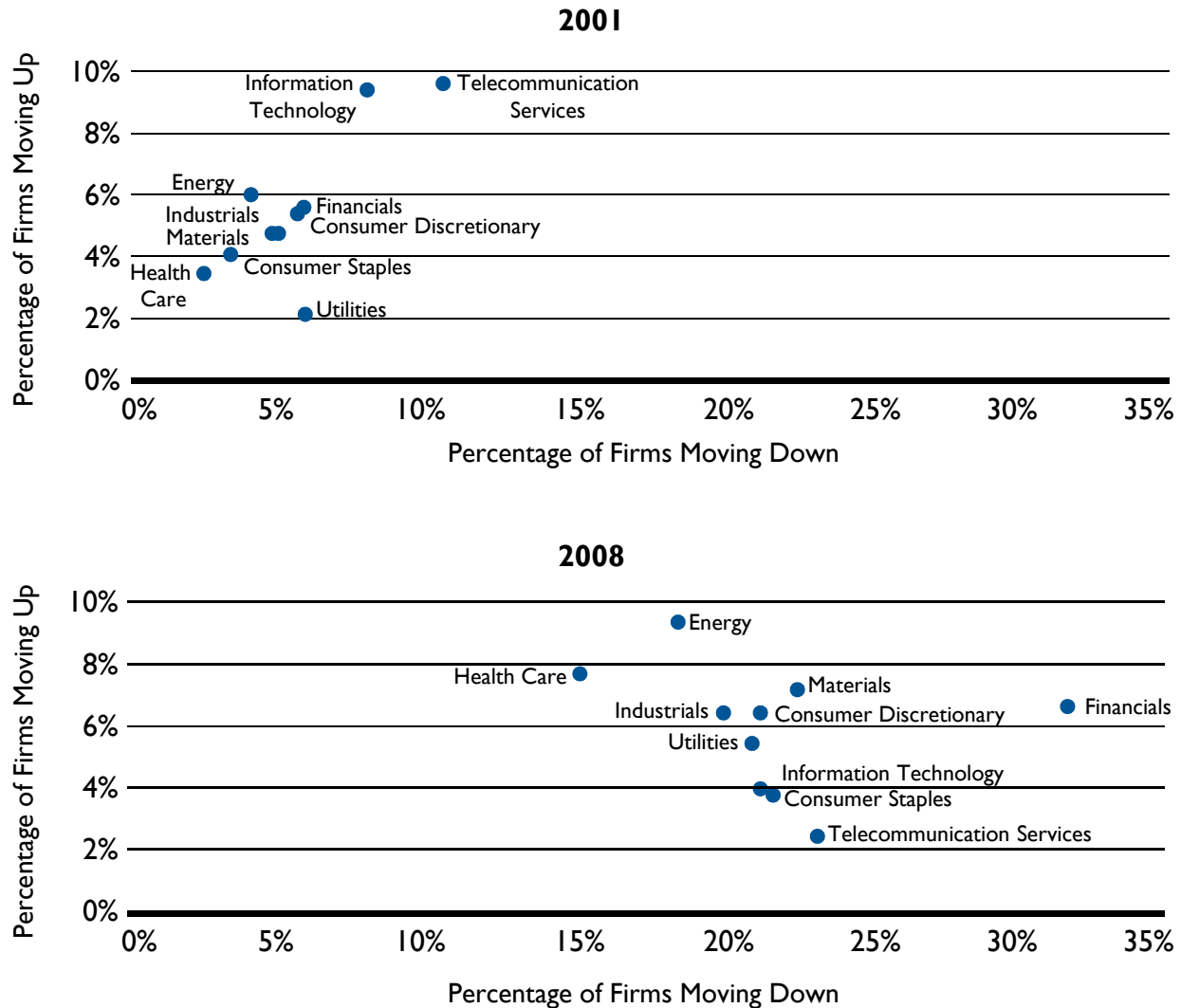
Where Winners Are Made



“Restacking” Occurs in Times of Transition

Industry Churn by Sector

Percentage of Firms Moving Up and Down
25 Percentile Points in Each Economic Sector, N = 5,442



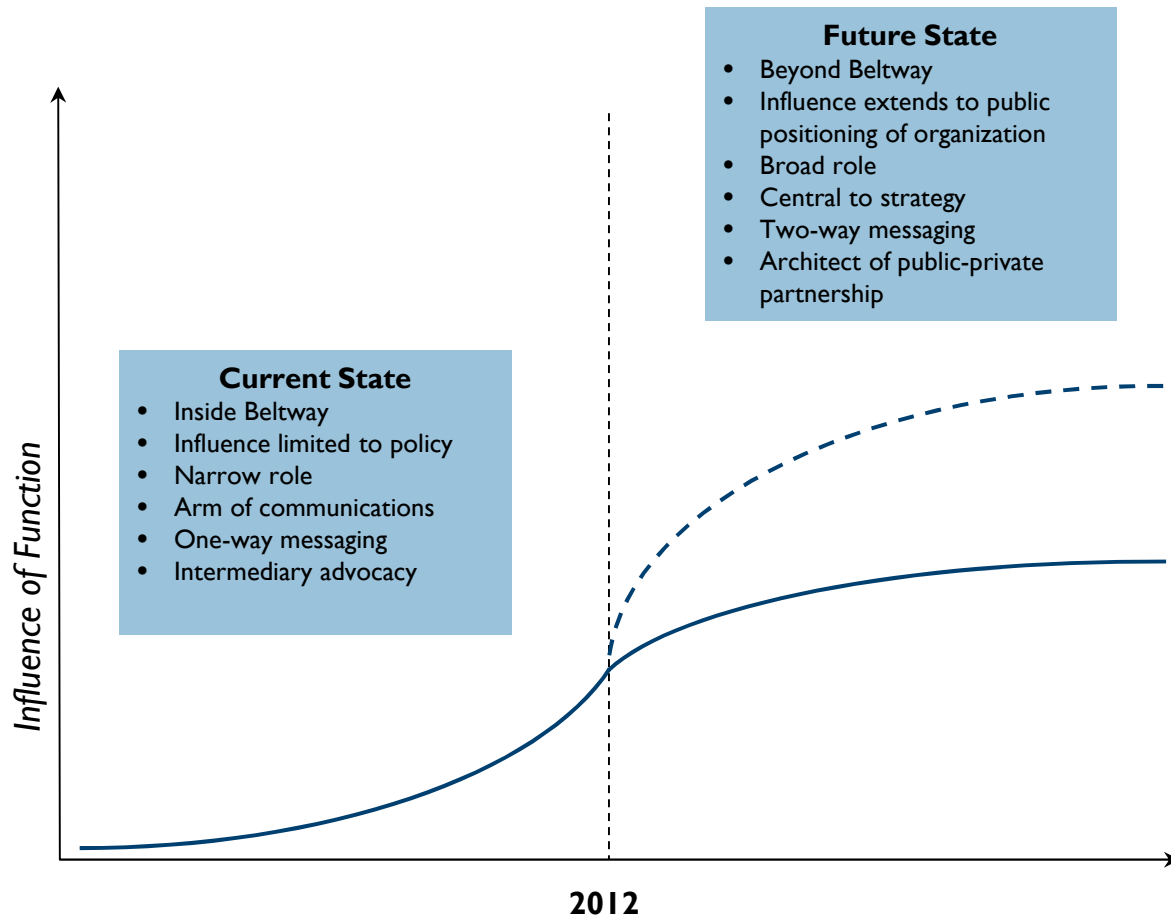
- Significant restacking (revenues and market value) of industry leaders and laggards has occurred in all past recessions.
- Dot.com boom created turmoil that was more interesting as to which incumbents took the lead or fell behind than it was for the startups (which largely disappeared).

Industry churn is defined as the number of firms moving 25 or more percentile points in industry rank as measured by market capitalization to sales ratio

Source: S&P; Compustat; Corporate Strategy Board analysis; National Journal Membership Research interviews and analysis.

Evolution of the Government Affairs Function

At an Inflection Point



Endnotes

- 8
Radio by Olivier Guin, 2007; TV by Piergo Borgo, 2012; iPod by Unknown, 2010; Computer by Unknown, 2010
- 13
Man by Noun Project, 2012; Capital by Jonathan Keating, 2012
- 22
Warning by Unknown
- 31
Capital by Jonathan Keating, 2012; Building by Benoit Champy, 2012; Man by Noun Project, 2012; Woman by Monika Ciapala, 2012; United States by Monika Ciapala, 2012
- 33
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012; Capital by Jonathan Keating, 2012; United States by Monika Ciapala, 2012; Building by Benoit Champy, 2012
- 36
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012
- 38
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012
- 39
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012
- 40
Conference by Sebastien Desbenoit, 2012; Opinion by Plinio Fernandes, 2011; Heart by Luis Martins, 2012; Eye by Travis Unis, 2012
- 41
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012
- 49
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012
- 58
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012; Building by Benoit Champy, 2012
- 60
Computer by Unknown, 2012; Meeting by Ben King, 2012
- 63
Approve and Disapprove by Unknown, 2010; Meeting by Ben King, 2010; Handshake by Jake Nelsen, 2011
- 71
Piggy Bank by Brock Kenzler, 2011; Calendar by Laurent Patain, 2012; Newspaper by Scott Lewis, 2011; Clock by Infinity Kim, 2012; Megaphone by Bram van Rijen, 2011
- 83
Man by Noun Project, 2012; Folder by Doxdoxchan Ngamsiriudom, 2011; Calendar by Nathan Driskell, 2012; Phone by Unknown, 1982
- 88
Worker by Bart Laugs, 2012; Man by Noun Project, 2012
- 92
E-Mail by United Nations OCHA, 2011; Phone by Unknown, 1982; Hashtag by PJ Onori, 2009; Blackberry by Andrew Forrester, 2012; Woman by Monika Ciapala, 2012
- 100
Blackberry by Andrew Forrester, 2012; Mobile Payment by Adam Mullin, 2012
- 108
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012; Building by Benoit Champy, 2012
- 110
Worker by Bart Laugs, 2012; Man by Noun Project, 2012
- 111
Social Media by Joris Hoogendoor, 2012; E-Mail by United Nations OCHA, 2011; Phone by Unknown, 1982; Handshake by Jake Nelsen, 2011
- 113
Tablet by Samuel Green, 2012
- 119
Man by Noun Project, 2012; Woman by Monika Ciapala, 2012; Capital by Johnathan Keating, 2012
- 122
Hashtag by PJ Onori, 2009; Man by Noun Project, 2012; Computer by Unknown, 2010; E-Mail by United Nations OCHA, 2011