



# A Data Science-Driven Approach to Influence



# BlueLabs

BlueLabs is an **analytics and technology company** formed in early 2013 by senior members of the **Obama for America analytics team**. We work with organizations to **optimize engagements with individuals**, run efficient organizations, and lead markets.





# About me

As a co-founder and **Chief Analytics Officer** at BlueLabs, main focus at BlueLabs is to **direct and implement analytics** programs that can have **positive impact** in the real world and **add value to our clients' programs**





# Useful Analytics

The biggest challenges that our political and corporate clients face **revolve around persuasion**.

Whether it is activating voters or persuading customers, **changing perception** is the core challenge.





# Advocacy

At BlueLabs, we believe that to run impactful campaigns you must **engage both grassroots and grasstops, creating mutually reinforcing forces** to drive your cause.





# Engagement

But since most **policy decisions are ultimately made by those in power** - legislators, government officials, and corporate executives - you should also **engage them and those around them.**





# Influence

Companies and advocacy organizations invest **billions of dollars in the United States each year engaging influencers** to try to shape the policy decisions that impact them.





# Impact

Engaging influencers in a positive and sustained way helps companies:

- **Manage public image**
- **Promote their brand values**
- **Impact legislation that affects them**





# Motivation

But they have a hard time identifying those who influence them beyond the core group of decision makers.

That makes it **harder when decision-makers might decline to take their calls and meetings,** or might do it only pro forma.





# Key Questions

1. How can we use data science and technology to **identify those who influence the decisions** that you care about?
2. How do you do it in a **systematic, scalable, and testable** way?
3. How can you ensure you're having an **actual positive impact**?



# Challenges

1. Influence is **hard to measure**
2. **Influence varies** across decision makers and domains
3. Influencers are sometimes **unknown or unpredictable**
4. It's **difficult to measure impact** with influencers



# Where do we start?



**JANE SMITH**

FLORIDA STATE SENATE  
(REPUBLICAN)

STATE SENATOR

## VICE CHAIR OF HEALTH POLICY COMMITTEE

Smith earned her B.A. and J.D. from Florida State University. Her professional experience includes working as an attorney at the firm of Walter & Nixon, focusing on corporate and real estate law. She is a Republican member of the Florida State Senate. She was first elected to the chamber in 2014.



# What do we know about them?



**Jane Smith**

**81**

**INFLUENCER SCORE**

## **PROFILE**

**Elected Official:** State Senator

**Donor:** Republican

**Healthcare:** Yes

**Technology:** No

**Politics:** Yes

## **DEMOGRAPHICS**

**Gender:** Female

**Age:** 46

**Education:** Post-graduate.

**Family:** Married, 2 Children

**Household Income:** \$125k

**Net worth:** \$250k

## **MEDIA CONSUMPTION**

**Cable TV:** 26%

**Cable TV:** 32%

**Digital Ads:** 43%

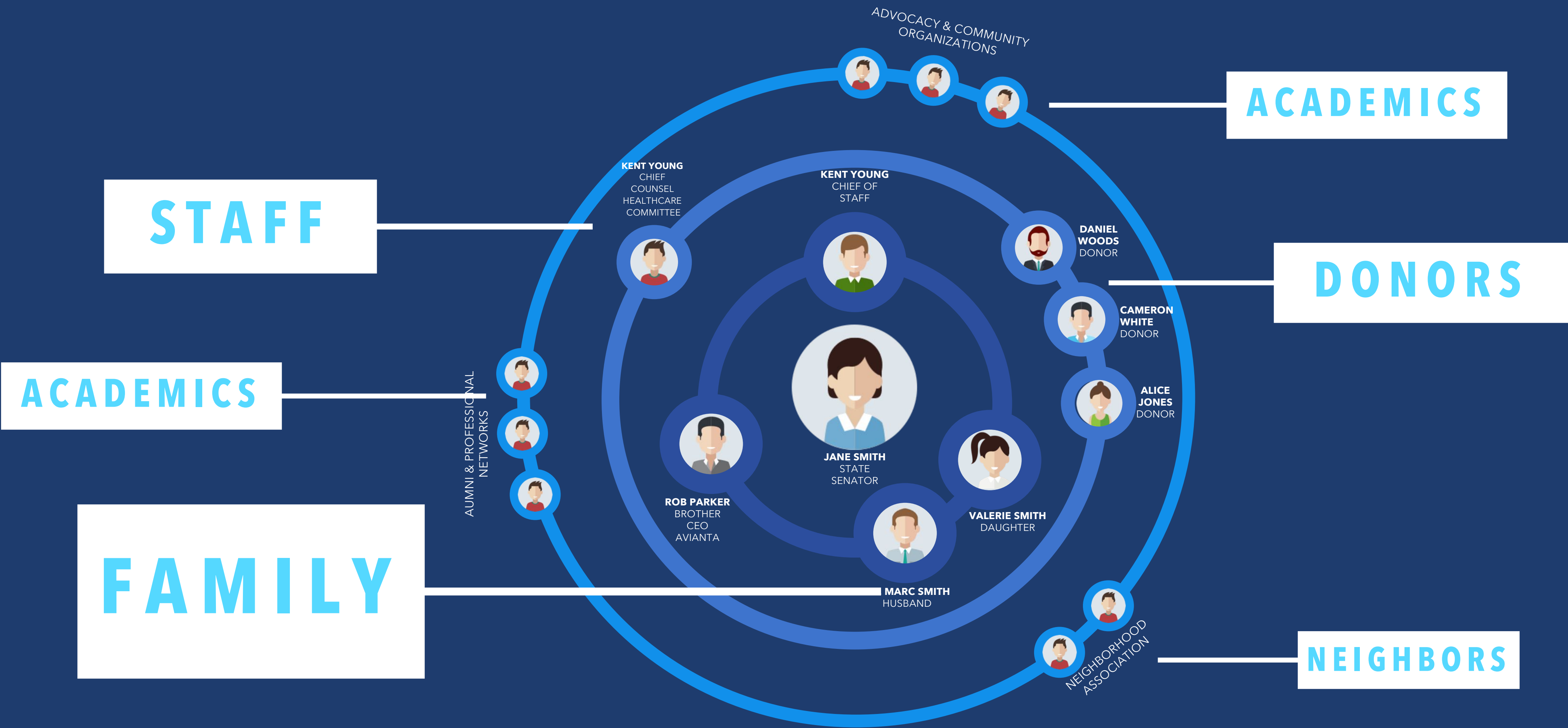
**Mail:** 9%

**Radio:** 21%

**Ad Engagement:** 4%



# Who influences them?







# Building our Influencer List



# Gathering Information

- 1. Different **sources**
- 2. Different **file formats**
- 3. Individual **names**
- 4. **Multiple files** per source

A	B	C	D	E	F
Name	Street Line 1	Street Line 2	City	State	Zip Code
APAC INC/O	101 Constitu	Suite 600 W	Washington	DC	20001-2133
NAHU) Nat	PO Box 20865		Indianapolis	IN	46220-0865
?				NC	
3 Strategie	PO Box 25363		Raleigh	NC	27611
7TH CONG	2439 HOLDEN BEACH RD	I	SUPPLY	NC	28462
AGGREGATE 1				NC	
AGG 121				NC	
AGG 122				NC	
AGG 123				NC	
AGG 124				NC	
AGG 125				NC	
AGG 126				NC	
AGG 127				NC	
AGG 128				NC	
AGG 129				NC	
AGG 130				NC	
AGG 131				NC	
3th Congres	314 South Eugene Street		Greensboro	NC	27401-2322
3th Congres	314 South Eugene Street		Greensboro	NC	27401
AGGREGATE 2				NC	
010 CCGOP GOLF TOURNAMENT			HICKORY	NC	28601
186 Investo	PO Box 18813		Raleigh	NC	27619-8813
ND TO NAT	1035 E. CASWELL ST.		WADESBORO	NC	28170
AGGREGATE 3				NC	
RD DISTRICT	115 APOLLO DRIVE		CAPE CARTEI	NC	28584
RD PRECINC	C/O HELEN C WEST CLUB		DURHAM	NC	27705
0/50 AT NOV. MEETING					
th District E of Republica	983 Osborne	Sparta		NC	28675
th District E of Republica	983 Osborne	Sparta		NC	28675
th District N Republican P	4311 Burning	Greensboro		NC	27406



# Categorization

- 1. Categorizing variables
- 2. Concept of **One Individual**
- 3. Append the **most recent information**

BUSINESS	HEALTHCARE	TECHNOLOGY	C-SUITE
AGRICULTURE	JOURNALISM	DEMOCRATS	NON-PROFIT
COMMUNITY	LEGAL	REPUBLICANS	REGULATOR
EDUCATION	LOBBYING	INDENPENDENTS	COMMENTER
ENERGY	MANUFACTURING	CANDIDATES	STAFF
ENTERTAINMENT	FINANCE	LEGISLATORS	THINK-TANK
MEDIA	POLITICS	EXECUTIVE BRANCH	CELEBRITIES
SPORTS	RELIGION	FORMER ELECTEDS	ATHLETES
GOVERNMENT	FOREIGN POLICY	DONORS	SPEAKERS
TOP NATIONAL	TOP STATE	TOP DMA	DIGITAL FIRS
TV VIEWERS	MAIL READERS	MOBILE REACH	RADIO LISTEN



# Matching

1. **Standardize** data
2. Create **uniform id**
3. **Import all databases**
4. **Probablistic Matching**  
algorithm





# An example of an aggregate Influencer profile



**Jamie Dimon** Source 1

Chairman & CEO at JPMorgan Chase

Spheres of Influence: Business, Federal Policy, Banking Source 2

## Information:

- Age: 62
- Salary: 29.5 Million Source 3
- Residence: New York, NY Source 4
- Newsmaker Index: 69th Source 5

## Donor History:

- Hillary For America (2016) : \$1500 Source 6
- Organizing For Action (2012): \$1000
- Priorities USA (2017): \$500







# Practical uses of Influencers



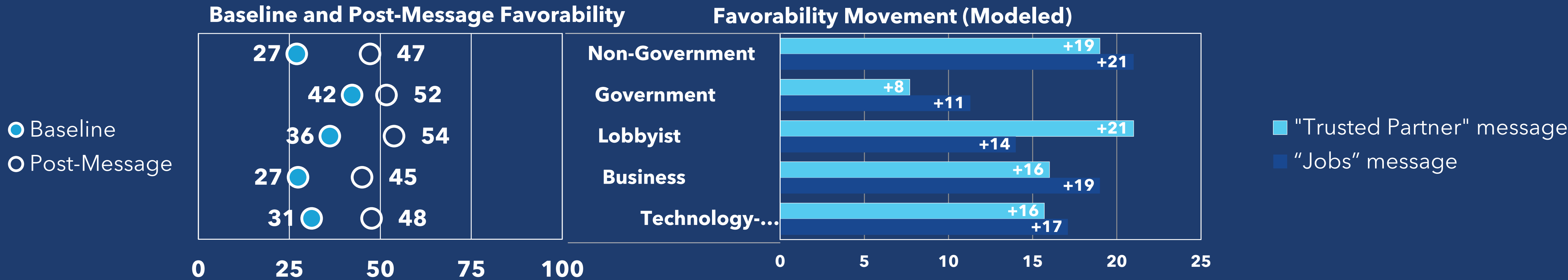
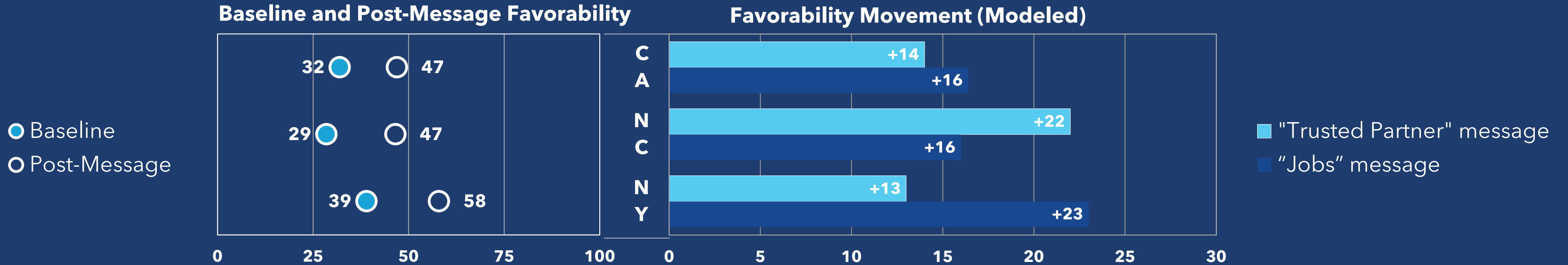
# Digital Advertising

- Influencers **loaded on to digital buying platform**
- **Custom audience created** specifically for your campaign
- Your online **ads delivered directly** to influencers





# Custom influencer surveys to measure support





# Uplift Modeling to Identify Persuadables

Uplift modeling **identifies the individuals** most likely to **take an action or change their mind** as a result of **receiving specific ads and messages**

Sure Things

Persuadables

Lost  
Causes

Do Not  
Disturb



# Uplift Modeling to Identify Persuadables

- Uplift modeling identifies the **most persuadable Influencers**
- Model scores **paint a picture** of Influencer opinions
- Identify opportunities to **impact Influencer opinions**



# Cross Channel Optimization

- Cross-channel helps reach targets **where they consume media**
- **Based on contactability models** that incorporate millions of IDs
- Helps **identify online & offline channels** for optimal saturation





# Discussion



An aerial photograph of a city street at dusk. The street is filled with cars, and the buildings on either side are illuminated by streetlights. The sky is dark, and the overall scene is a mix of urban activity and historic architecture.

Contact me at [dan@bluelabs.com](mailto:dan@bluelabs.com)  
Twitter: @statporter