

BAND THREE

(\$300,000 TO \$750,000: LARGE STATE SENATE RACES, SMALLER CONGRESSIONAL RACES IN SMALL STATES.)

WEAK

A tool is weakly recommended in this area vs. finding workarounds.

MODERATE

A tool is moderately recommended in this area vs. finding workarounds.

STRONG

A tool is strongly recommended in this area and at this level, if funds allow for it.

MESSAGING/MEDIA TOOLS

At this level, for MESSAGE DEVELOPMENT you are most likely going to use a firm like Analyst Institute, Growprogress or Avalanche strategy to craft your messaging due to size of race.

For CREATIVE ASSET AND TOOLS/ STOCK FOOTAGE you will likely work with a firm for creative assets, development and testing, like Social Native, Collective Agency, Smart Shoot, Countable and AspireIQ. You might still use Canva and Spark or Flipgrid for video, but custom video and ads are more likely.

For PAID MEDIA TOOLS you are likely to test across both TV and digital media at this level. For digital media, you will need a firm to optimize your message and reach, like Civic Analytics, DSPolitical, or Red2Blue. Google Adwords, Facebook, Instagram and Twitter have their own targeting tools as well.

You will bring in TV TARGETING AND ANALYTICS TOOLS as this level too like Six Zero Five, Analytics Media Group, and Acxiom for targeting and Fourthwall and Strata for TV buying.

For social media, you will want to have a FB page, and optionally a twitter presence and Instagram presence. Add a Youtube channel as you will have multiple videos and might want to use a TESTIMONIAL TOOL via your Field team.

For OWNED MEDIA, you'll want to make a free website via Squarespace, Snapsite, Engage Progress, Wordpress or Wix. Sometimes at this level you will make and host your own site, and ShareProgress can aid you with full back end development and visual and UX development.

NGP VAN, Blue State Digital, and NationBuilder go across the entire suite of functionality and allow not only for building of web sites but for email and social posting and fundraising. They are as "one stop shop" as any tool can be in this area.

Consider a BLOGGING TOOL via Reddit or Medium at this level for a bigger web presence. Link to posts via your social media channels.

Use an EMAIL MANAGEMENT TOOL like Mailchimp or for lists and email sends, and make sure to collect email and cell phone on your web site home page to be able to contact interested potential voters en masse.

IM TOOLS like Chatfuel and Grove AI focus more on network and Facebook Messenger, allowing you to move into conversations or ignite conversations via instant message about things pertaining to your campaign.

DATA ANALYTICS/MODELLING TOOLS

For DATA SOURCES, you will likely use a data tool like or NGP VAN through your state party. NGP VAN is sometimes also called Votebuilder. You can also use Targetsmart or Catalist or Nationbuilder to get access to voter files, depending on your preference regarding cost, how the data is sorted when you receive it, and how up-to-date it is. The state party will grant you access to NGP VAN (Votebuilder) if you qualify.

Some candidates use lists from previous races or campaigns. Just beware that data can change a LOT between races and it's better if you can afford the cost of data from a tool. Good data is critical to winning or losing a race.

At this level you will begin using DATA AGGREGATION AND MAPPING TOOLS and companies like Neustar, Vertica, Resonate, Blastpoint, BlueLabs, LiveRamp, Verto and others alongside your data source, be it NGP VAN or Targetsmart, Catalyst or L2.

You will want a tool at this level to MANAGE VOTER AND VOLUNTEER CRMS, if you can afford it. At most levels NGP VAN (Votebuilder) is the CRM used, but Nationbuilder, Salsa, Groundbase, Crowdskout and Voter Gravity can offer alternatives. Most campaigns will use NGP VAN to track their voter lists and voter contact and another tool to track their fundraising and supporters.

For VOTER MODELING AND TARGETING you will need big data and custom analytics at this level. Consider BlueLabs, Clarity Campaign, Civis Analytics, or Haystaq.

For FUNDRAISING ANALYTICS, begin considering tools like Calltime and RevUp and organizations like Grassroots Analytics and Bluelabs can take your CRM data and help you apply automation and AI to it in order to know who to call first on your list.

FIELD TOOLS

For MAPPING AND TURF-CUTTING, if you have a GIS-trainer volunteer you can consider a free tool like ESRI. But if not, consider even at this level a downballot tool for cutting routes like Victory Guide or Walklist or ecanvasser. You can get a standard package of map from Empower Engine as well.

For TRACKING DATA while mobile canvassing, if you are using NGP VAN (Votebulder) you can track data via MiniVAN. But tools like Victory Guide also allow for mobile uploading as you knock doors if you don't have NGP VAN access for some reason. Tools like Knoq and Polis allow you to pull easy walk sheets with scripts you can use door to door and logging tools with its own voter file amplified by its own canvassing team that's gone door to door collecting data. Some tools focus on analytics and dashboards. The tool Organizer gives detailed metrics by team and canvasser, real-time live analytics for managers to help their teams with corrections, and reports on optimal canvassing times and most impactful routes and teams.

For EVENT TOOLS, consider Mobilize America at this level if the cost can be managed within your budget for the VAN integration

Most campaigns use NGP VAN features for dialing at this level and don't bring on an independent PHONEBANKING TOOL. But independent phonebanking platforms like Callhub or Hubdialer are tools sometimes added at higher levels. Similarly, dialer tools are only sometimes used at this level. Dialer tools like Calltime.ai are sometimes onboarded before NGP VAN just to gather the donations to afford VAN. ParagonVoicemailDrop simply leaves voicemails for an alternative approach and I worth testing at this level. Dialpad, Callfire, CallTime.AI, LiveVox and Sideline are tools that might also come in at this level, that allow you to make lots of simultaneous calls at once.

TEXTING TOOLS are used at this level! Texting is as important as phone calls. Tools like Hustle or Getthru are wise investments at all levels.

RELATIONAL ORGANIZING TOOLS are also something to consider and test. Tools like Team and Votercircle are great experiments to try, and Outvote is a great test to run too. Social voting tools like Votewithme and Motivate also aid with GOTV.

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RESEARCH TOOLS

While you can lean on local orgs and your state party to run polls for you and see how you are tracking. Also, stay attuned to polls in media by doing Google alerts on your name and campaign, a **POLLING TOOL** is critical at this level. Firms like CallFire, Qriously, Database Systems Corp and Change Research can help.

You will likely integrate tools for both **SOCIAL LISTENING AND SENTIMENT ANALYSIS** around this level. The former is more critical. Consider Crimson Hexagon, Sprout Social, Redflagai and TweetDeck.

OPPOSITION RESEARCH AND MEDIA MONITORING are critical at this level. Companies like Media Meter, Project Vantage, Factbase, Vigilant and Every Politician and IQ Media exist for candidates to both run dossiers on themselves to see where they might get attacked (which sadly you must assume will happen) but also to figure out where to defend or attack on your own should someone try a smear campaign against you.

POLICY RESEARCH AND LEGISLATIVE TRACKING get more serious at this level. Use some combination of monitoring Popvox, Trackbill, Crowdshout to monitor and respond to legislation changes in your area.

FUNDRAISING TOOLS

You're going to need to use a **DONATION PORTAL/ PROCESSING TOOL** that can either be found within **NGP VAN** (Votebuilder,) or integrated into **VAN** via ActBlue, Democracy Engine, SnapSite or, the Groundwork, all of which have simple donation forms that can be linked to from your website for donations. Democracy Engine's main focus on cyber safety and allowing multiple donations at once, while the ActBlue platform is mobile-optimized, has one-click donations, saves user information for future donations, allows for A/B testing and form branding. **NGP VAN**, Snapsite and The GroundWork and NationBuilder are multi-use platforms integrating donation processing, which ActBlue and Democracy Engine hook into **VAN**.

Most campaigns will likely be using some form of **NGP VAN** as their CRM, but Kindful, Voter Gravity, Salsa and Salesforce can be alternatives. Calltime.ai and Revup can also enhance the fundraising process.

REGULATORY COMPLIANCE AND REPORTING TOOLS are critical at all levels, and if you don't buy your data through a third-party source compliance can get harder. Tools like **NGP VAN** (Votebuilder,) Catalist and Nationbuilder can make the compliance process much easier for your team by way of easy compilation and downloading of reports. At this point, you should be very actively considering a commercial solution to handle your filings, such as **NGP VAN**.

CYBERSECURITY TOOLS

For safe **TEAM COMMUNICATION TOOLS**, choose Wickr over Slack if you feel the need to tightly encrypt all messages flowing back and forth. (This is as per user preference on this level.)

Consider **IM ENCRYPTION TOOLS** like Signal for encrypting your own IM messages and also recommend to your team to do the same, if you are concerned about leaks or slander.

You will add on a **SYSTEM MONITORING TOOL** for bots and viruses and malware through a tool like Datadog.

CDN, DNS and DDOS PREVENTION TOOLS are going to be important if you have any campaign servers you are using in-office. If you are hosting web site and donation portal offsite, an attack would likely affect web site hosts transaction processors that are third party. In this case, all you can do is hunker down and hope that they resolve it, or switch processors/site hosting services.

TEAM ORGANIZATION/ COMMUNICATION TOOLS

One of the most common **TOOL SUITES** in use among campaigns is Gsuite, for sharing documents among campaign members fast. Dropbox is another option for fast sharing of files.

You will need a **VIRTUAL MEETING TOOL**. Google Hangouts work very well for meetings up to 8 people, but past that, a tool like Zoom, Anymeeting or Appear.in might be a better bet as they can host more callers on the line without the call dropping.

Your team will be across geographies or neighborhoods, so consider a **TEAM COMMUNICATIONS TOOL** like Slack or Wickr to allow your team to organize virtually. As mentioned in the cybersecurity tools section, Wickr boasts more encryption features than Slack, if that is a priority.

Trello is a **PROJECT MANAGEMENT TOOL** that uses "Cards" and "Boards" To digitize project management and to-do's across teams that are not in the same area.

Divvy is a **TEAM BUDGETING TOOL** that allows your team to budget as a team. Users can allocate funds to "subscription" cards for predictable expenses and "burner" cards for ad hoc purposes. By categorizing your expenditures in real time, campaigns always have access to spending analytics.

For **PERSONNEL HIRING AND TRAINING**, consider a few training programs alongside volunteers and interns. The Arena, Wellstone, National Democratic Training Committee, Resistance School and Campaign Greenhouse have courses for campaign staff to learn the basics of running a campaign and are great to recruit from.

DOCUMENT SIGNING SERVICES like DocuSign can make it a lot easier for bulk signing of documents within a team, and shortcut gathering, for example, NDAs among your campaign staff and volunteers.