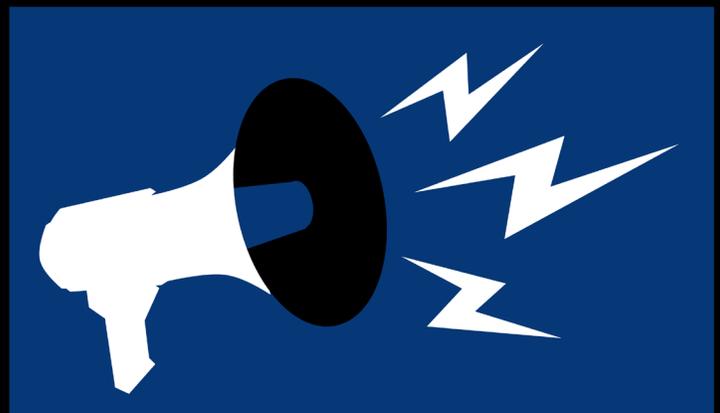


# TECH YOURSELF

A TECH FRAMEWORK GUIDE FOR PROGRESSIVE & DEMOCRATIC CANDIDATES

ISSUE  
**7**

## CURRENT MARKETPLACE DILEMMAS: WHAT TO ASK CONSULTANTS AND FIRMS BEFORE HIRING



LEARN HOW TO RUN A DIGITALLY SAVVY CAMPAIGN!

# **TECHYOURSELF**

**A FRAMEWORK GUIDE FOR CANDIDATES  
ON HOW TO USE TECH TO WIN CAMPAIGNS**

**CURRENT MARKETPLACE DILEMMAS:  
WHAT TO ASK CONSULTANTS AND FIRMS BEFORE HIRING  
WHAT TO ASK VENDORS AND CONSULTANTS BEFORE HIRING, AND HOW  
TO PREPARE BEFORE CHOOSING A CAMPAIGN TOOLSTACK.**

**[WWW.TECHYOURSELF.ORG](http://WWW.TECHYOURSELF.ORG)**

**ILLUSTRATED BY DANIEL SCANNELL**



# Current Marketplace Dilemmas

---

Now let's move into tools. Something that muddies the waters a lot with tool usage and preparation is the fact that there are over 300 tools out there, each with vendors that are very, very eager to sell you their product. It's important to go in informed, to understand how to prepare for the tools you intend to use, and to make sure you ask vendors and digital consultants and agencies the right questions.

## Areas of Preparation Before Campaigns

Whatever tools you use, one rule always holds: the better prepared you are to implement these tools, the easier it will be to get started. Campaigns that start strong have a much higher success rate than those that struggle out of the gate and gain steam later. You should be looking for opportunities to use the tools you are considering in real world applications. How can you do this? By helping like minded candidates running on different calendars. Even if it means leaving your district/state, taking a weekend to go volunteer for another candidate might get you the answers and understanding you need to find success in your own campaign later. Don't go expecting to steal that candidate's time or monopolize their staff; just go be a volunteer, and after their campaign ends, circle back for a debrief with them. Ask them what worked and was easy to implement. Ask them which tools were a nightmare and had their staff tearing their hair out. See if you can get tips about integrating data across tools, as this is a challenge all campaigns face.

If your state Party or legislative caucus campaign is using the tools you are curious about, ask them if you can trade some volunteer time for a look inside how they are using those tools and how those things are working on the whole. If you have the skills/capacity to be a candidate, you likely have skills/capacity they could utilize.

## Vendor-Driven Marketing: Why It's So Hard to Get Answers

As a campaign manager, identifying which tools to invest in with your limited budget is an enormous challenge. With minimal free time and urgent responses needed for everything, trying to learn about available tools, their possible competitors, their efficacy, and their ability to help your specific campaign is a near impossible task. So, campaign managers are presented with is a series of infomercial-like pitches- where the sun, moon, and stars are promised, and weak points often hidden. Political tool builders are a desperate breed. They have to survive long "dry periods" every four year cycle that can easily drain them or bring down their company. They often have high turnover on their staff, and they are fighting in a market that has a limited amount of money.

Even the best of us will be convinced now and again to purchase a tool that completely fails out of the gate. If that happens in the early stages of your campaign, that's not typically a big deal if you have a money-back guarantee. But when it happens in the late stages of your campaign, the money-back guarantee can't get you back the precious time you lost during GOTV trying to implement a tool that crashes at a critical moment.

ACRONYM has built a digital guide to begin to aid campaign managers in comparing tools and finding the best ones. They compare on cost, feature sets and more. [See their digital guide here.](#)

In general, here are some basic assumptions to make when translating from vendor-marketing to your real world experience:

- More staff/volunteer time will be required than advertised. This never changes.

- Cost overruns will happen unless there are hard stop systems or contract language to prevent them.
- You know your data isn't perfect going in, why would you expect it to be equally/more perfect once it's imported to a new tool? Be realistic. Data never changes.

Things you should ask for if it isn't the vendor directly pitching you:

1. Are you being paid a commission or receiving a discount or some other kickback to get me to use this product?
2. What problems did you encounter with the product, and what was the timeline for resolution?

If you think that this tool drove a result, how did you measure that this tool was the (or an) element that made you successful? If someone tells you that their tool drove thousands of votes to swing an election, ask how they were able to measure this (was there a control group? Etc.). Most cannot answer.

## Questions to Ask Vendors Before Using a Tool

ACRONYM has put together a terrific guide for what to ask before using a tool. They have allowed us to paraphrase this content below, but see their original Medium article [here](#). This list was written for campaign staff considering purchasing organizing tech, which they define as tech used to facilitate direct voter contact and volunteer recruitment in the field for field organizing teams.

First, consider a live demo. This will allow you to see “user flow” through the tool and visualize the journey your staff or donor will be making. If it's confusing to you, it's going to be confusing to them, so trust your gut here. And, with regard to internal systems, does the dashboard look user friendly? Or are you going to spend a lot of your time just trying to figure out what you're looking at? If the platform claims to have multiple functions you're interested in, ask to see all of those functions demoed live. Email tool? Call tool? Canvassing tool? Ask to see how each one works independently; this is to not only ensure that they actually work, but to ensure that they also suit your needs. You should take note of when a vendor says a feature is “on their road map.” This means that they're working on developing the feature, but it does not currently exist. Be wary here—development timelines can be delayed, and if they say it's “on their road map,” this does not necessarily mean that it will be ready for your campaign cycle. Make sure to ask for a specific date for when the feature will be rolled out and hold them accountable to that date.

Then, consider permission settings. As you go through a demo, ask about user permission settings- in other words, the ability to give different users different levels of access to the platform. You'll likely want different levels of organizing management to have access to different levels of datasets for consistency and accuracy. Make sure the vendor you're talking to offers different levels of user access: turf-specific access for organizers, regional-specific access for RFDs, statewide-specific access for statewide level staff, etc.

1. You would be surprised how hard it is to get a cost as well. Many vendors like to say that they're ‘the most affordable’ in the market, but not all vendors have transparent pricing policies. Some specific questions to ask vendors in relation to their pricing include:
2. Do you charge per user? Is there a cost for adding users later on?

3. Is there a fee to connect an integration or to maintain it? For example, do you integrate with NGP VAN? Is there a cost to turn it “on” or maintain it?
4. Are there any set up fees?
5. Are bulk discounts available for purchase in advance?
6. Do you charge per emailable contact record or just contact records in general?
7. What, if anything, could cause costs to increase?
8. Are we charged for reaching out to customer support or for asking questions?
9. Is there a cost for activating an API connection or getting your tools to talk to another tool we’ve purchased?

If possible, ask for a “30 day out clause.” Many vendors will provide for a 30 day out clause in your contract, giving you the ability to cancel the contract anytime during the first 30 days. We highly recommend asking about a clause like this in case you end up not being happy with the platform.

Also ask about onboarding and customer support. How long will it take for us to be onboarded once we’ve signed? If we have a major issue, how long can we expect support to get back to us? Many vendors will put a guaranteed amount of time it takes to get back to you about support requests in your contract. If they violate this, hold them accountable. Ask what the onboarding process looks like, and if there is an extra charge for requesting a phone call or screenshare for troubleshooting?

Most tools integrate with the voter file. Hit this right away in your questions. Does your system have access to the voter file? If yes, what provider do you use? If not, do you have a current partnership with a data partner who can facilitate access for us to the voter file? What does voter file maintenance look like? How often is it refreshed? If you have any integrations with voter file tools, what data syncs over? Is it a one-way or a two-way sync? It’s really important to dig in with tools that say they sync with the voter file. You probably want something that has a two way sync, meaning that the tool can both put new information into your file -like canvass responses- and pull information out of the file into the tool -like a contact list. However, some tools only go one way and might not say this upfront.

As your data is yours until a tool has it, make sure you know what they can do with it once it’s inside their systems. Especially because you’ll be dealing with the voter file, you want to ensure they won’t do anything undesirable, such as sending .csv files of people’s information via unencrypted email. Be wary of vendors who say, “Yeah, just send us spreadsheets via email.” Ask them pointed questions about quick surges too. How do you handle election day scale? We expect activity to pick up by two powers of 10 during GOTV, what are your uptime guarantees and how do you staff election days? And finally, make sure to ask who owns the data and how to get all your data once the campaign is over? The answer should be you, but asking this will hammer the point home that you don’t want any messing around. If the answer is not you- run.

One final note: while we live in an environment that’s more partisan than ever before, know what sides of the aisle your tech vendor supports. This question matters more to some than to others, but you should at least know where you’re spending your dollars.

DemLabs regularly tests and evaluates new apps that candidates can use with the assumptions that small

campaigns have little money, time, or technical skills. With this it finds existing apps in the business sector that are either free or inexpensive. It shares details on these apps through its [website](#) and a newsletter along with links to free online training.

## Critical Questions for Digital Marketing Firms

Before hiring a firm, talk to others that have used them and have an expectation going into the process of what you expect the firm to do for you. Is this a firm you want to do list building and fundraising? Do you need them to produce advertising creatives and run persuasion buys? Make sure you outline every task you assume the firm will do on your behalf and include that list when you request a proposal. When you receive the proposal, make sure that the tasks they have outlined meet your expectations. Also, check that they aren't charging you for things you did not ask them to complete and ask for examples of past campaigns they have worked on for each specific task- this can prove that they are experts in these tasks.

Sometimes digital ad firms will be an expert in one area, but they will end up outsourcing other digital tasks. It's helpful to get transparency on this, because it can create longer lead times if they don't have staff in-house to complete your work. It's important to ask around. For example, if a firm started with an expertise in marketing, they might be weaker on social media tactics. Additionally, if the core function that you want them to perform isn't something they do in-house, it might be worth re-evaluating whether they are the right firm for you.

Make sure to set up a reporting structure as well- with a clear person in charge. Ask who from their staff will be involved with your campaign. Who is the day-to-day contact? Who is the senior advisor? Make sure they know who on your team has the ability to make calls on things other than you. For your part, deputize your staff so they can move fast if you are not in the office.

Also, set expectations on timelines and deliverables for tasks that you expect then to do frequently. For example, if you need a graphic for social media, what is the timeline on their end from the time of request to the first draft received? Sometimes agencies will not want to answer this question, and they'll say it "depends on the amount of edits from your end;" however, it's good to get an average timeframe, so you aren't surprised when things ramp up. Press on this. Get an answer. If you need to, talk to other candidates and use what they learned to demand something reasonable so things don't take double the time they should. Furthermore, ask what the staff expectations are on their end, in terms of work hours and weekend hours. Campaigns are an "always on" job and agencies that don't expect the same of their employees that manage campaign work cannot keep up.

When they are advertising for you, a few extra questions should be asked:

1. If the firm plans to do fundraising on your behalf, ask what kind of cost per acquisition they expect based on the budget level you are thinking of investing.
2. How quickly can they get an ad live? There is a huge variance in different firms. Some firms will say they need at least one week to get an ad live, while others will do it within a day. Depending on your rapid response needs, you should make sure you are aware of their process.
3. What is the reporting schedule you can expect? For example, on the JB for Governor campaign, the team received a report at least once a week that detailed both acquisi-

tion and persuasion metrics. Some teams do not report as regularly as this

4. What kind of precautions do they take to make sure that your advertising is being seen by voters and is not running on any sites that aren't "brand-safe"? For example, are they checking bot traffic reports regularly? Do they do checks on ad viewability? Are they checking the site lists where your ads are serving? Make sure to ask these questions.

"MAN IS STILL THE MOST EXTRAORDINARY COMPUTER OF ALL."  
-JOHN F. KENNEDY



