

Learning from Obama:



**Lessons for Online Communicators
in 2009 and Beyond**

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The contents of this e-book are also available as [a series of standalone articles at Epolitics.com](#).

Learning from Obama: Lessons for Online Communicators in 2009 and Beyond

Without the internet, Barack Obama would still be the junior senator from Illinois. Under the rules of the broadcast era of politics, a young man with a funny name and a couple of years in the Senate might run honorably but would almost certainly lose, crushed by the ability of an experienced candidate like Hillary Clinton to raise money from big donors and lock up endorsements from elected officials and party activists.

But Barack Obama declared his candidacy in 2007, not in 1991, and his two-year campaign for the White House could rely on the internet to an unprecedented extent for its core functions. His staff would employ a combination of both new and proven online technologies to organize volunteers, to find new supporters and put them to work, to turn out voters on election day and (of course) to raise unprecedented amounts of money — all contributing to a crucial edge in the primary and general elections.

Both Obama and Republican rival John McCain relied on the net to bolster their campaigns. But Obama's online success dwarfed his opponent's, and proved key to his winning the presidency.

["Propelled by Internet, Barack Obama Wins Presidency,"](#) Sarah Lai Stirland, [Wired.com](#), 11/4/2008

Obama's online staff and the contractors they employed designed, built, tested and steadily improved a series of systems and procedures that formed the basis of a scalable, distributed organization that by November of 2008 spanned the United

States and penetrated areas in which Democrats had not competed in years. The Obama new media team tried many techniques in the process, but motivated by the need to achieve measurable political results, they focused on replicable models, practical tools and incremental improvements. In the end they were richly rewarded: their work midwived an astounding level of citizen interest and involvement for a modern political campaign. The numbers alone are impressive:

On MyBarackObama.com, or MyBO, Obama's own socnet, 2 million profiles were created. In addition, 200,000 offline events were planned, about 400,000 blog posts were written and more than 35,000 volunteer groups were created — at least 1,000 of them on Feb. 10, 2007, the day Obama announced his candidacy. Some 3 million calls were made in the final four days of the campaign using MyBO's virtual phone-banking platform. On their own MyBO fundraising pages, 70,000 people raised \$30 million.

["Obama Raised Half a Billion Online,"](#) Jose Antonio Vargas, Washington Post, 11/20/2008

The campaign took of advantage of more specialized donations as well, from [Will.I.Am's "Yes We Can" video](#) to volunteer software development:

In many ways, the story of Obama's campaign was the story of his supporters, whose creativity and enthusiasm manifested through multitudes of websites and YouTube videos online. It even resulted in volunteer contributions like the innovative Obama '08 iPhone and iPod touch application that enabled owners to mobilize their friends and contacts in battleground states through the Apple devices.

["Propelled by Internet, Barack Obama Wins Presidency,"](#) Sarah Lai Stirland, Wired.com, 11/4/2008

But it was the internet fundraising that first caught campaign professionals' attention, since it spoke a far older political language: money.

In fundraising, Obama followed in the footsteps of Howard Dean's 2004 bid by regularly soliciting small donations from a wide swath of voters, raising record amounts online by federal filing deadlines. He then used this money for more traditional campaigning — for example, flooding cable markets in strategic states with television advertising. Obama spent a record-shattering \$293 million on TV ads between January 1, 2007, and October 29, 2008, according to TNS Media Intelligence. McCain spent \$132 million during the same period.

[“Propelled by Internet, Barack Obama Wins Presidency,”](#) Sarah Lai Stirland, [Wired.com](#), 11/4/2008

Regardless of any other advantages he possessed in the 2008 election season, [Obama's ability to raise as much money as his campaign could reasonably absorb, in part by returning to the small donors who stuck with him again and again through the worst, was decisive](#) — it elevated him to the first tier of candidates in 2007, it saw him through rough times in the Democratic primaries and it provided the means for him to absolutely overwhelm John McCain in the general election.

But as we shall see, fundraising was only one component of Obama's carefully nurtured relationship with his supporters, which ran through many channels but had a single ultimate goal: electing him President of the United States.

Learning from Obama's Online Success

Social media lessons from the Obama campaign

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

- Integrate online advocacy into every element of the campaign

["The Social Pulpit: Barack Obama's Social Media Toolkit,"](#) Edelman Digital Public Affairs, January 2009

What can other online communicators learn from Obama's example? His drive to the White House has obvious implications for future political candidates, but everyone from neighborhood activists to corporate marketers can learn from aspects of his online odyssey. Let's spell out a few general principles first:

- **The Obama organization integrated online communications into its overall structure and processes.** New media team director Joe Rospars was not buried in the technology or communications department, as were his counterparts in most other presidential campaigns. Instead, he reported directly to campaign manager David Plouffe, and he and others on his staff worked alongside liaisons from other campaign areas such as field organizing and fundraising, sometimes sharing desks in cramped spaces.
- **Obama's internet communications strategy aimed at concrete, focused and measurable goals, both online and in the real world.** Even with the relatively vast resources at hand, his internet communications staff built carefully, innovated only as needed, and invested in projects that seemed to have a real chance of paying off in time to win. Conversely, the campaign hunted supporters through many different online channels and provided them many potential [tiers of engagement](#), with an aim to get as much effort and value out of each volunteer as he or she was willing to give.
- **The campaign used the internet to put supporters to work substantively both in-person and online.** From the beginning, the Obama site gave supporters the

knowledge and the means to organize and reach out within their own social circles, and millions ultimately participated in virtual and real-world evangelism on his behalf. Obama partisans badgered, recruited, cajoled and persuaded friends, neighbors, family and complete strangers over the entire course of the 2008 race, and their weapons included parties, events, phone banks, personal phone calls, text messages and door-knocking, plus every online tool available. And, the campaign trusted them to do it.

- **The campaign carefully targeted much of its online outreach**, hoping to maximize the bang-to-buck ratio by delivering the right messages to the right people at the right time. Their emphasis on targeting is visible in everything from customized email messages to Google keyword advertising to online videos directed at people based on their interests or where they lived:

In addition to videos on national issues, the campaign also used geographically-specific videos. In the important battleground state of Ohio, for example, the campaign posted videos of Obama canvassing door-to-door near Toledo, talking to folks about the issues facing their state. The email and video were placed near a button inviting viewers to sign up to volunteer.

[“What Worked for Obama Can Work for YOUR Organization,”](#) Andrea Wood, M+R Strategic Services, January 2009

- **The Obama operation treated the supporter relationship as a two-way street**, with information and contributions (financial and otherwise) traveling up the chain even as staff instructions and fundraising emails came down. Besides the high-profile “Yes We Can” and other supporter videos that the communications staff helped spread far and wide, individual volunteer phone-bankers and block-walkers provided data that [the campaign used to make strategic decisions about resource allocation up until the last hours of the race](#). In return,

members of the volunteer teams dotting the country were held strictly accountable for their roles and for the goals set for them — the campaign was not afraid to “fire” a volunteer.

- **Fundamentally, Obama’s campaign looked upon supporters as a resource to be maintained with great care** — as a set of relationships to nurture — and saw the internet as the most useful technology to stay in touch with them, keep them motivated and put them to work.

The Obama Toolkit:

Just about any online application imaginable turned up at some point in the 2008 political season, but these are the ones that the Obama campaign found to be consistently effective:

Website

From its email-capturing splash screen to its opportunity-heavy navigation, BarackObama.com was a ruthless recruiting machine. The website actively pushed volunteers toward resources in the MyBarackObama.com toolkit, aiming to put them to work in their own neighborhoods and social circles. The site was also vital for messaging, particularly through the official campaign blog, which distributed videos, talking points and other information to supporters, bloggers and the broader media world. Through all the long months of the 2008 race, BarackObama.com was the hub around which the campaign’s online outreach revolved.

Email

Email was the main tool used to build relationships with supporters and to raise money

— if you talk to members of Obama's online staff, it tends to come up again and again. The campaign's (opt-in-only) list topped 13 million names, to whom were sent some 7000 separate campaign-written emails totaling roughly one billion actual messages. And of course, email was one of the main ways individual activists spread the word among their own friends and family.

MyBarackObama.com

Inspired in its approach by social networking websites, MyBO was an online toolset that volunteers could use to organize events, run their own fundraising campaigns, write blog posts, recruit friends and otherwise get involved in helping to elect Barack Obama. [MyBO was particularly important in areas in which the campaign did not have professional staff](#), since it gave volunteers the means to create their own local campaign structure — professional field staff could “parachute in” as elections approached and immediately take over a functioning organization. But all across the country, even in areas with a strong campaign presence, MyBO provided a productive conduit for supporter energy and a launchpad for supporter activism.

Multi-Channel Online Outreach

The Obama campaign passed up few opportunities to connect online. MySpace and Facebook as well as niche networks such as Black Planet were fertile ground for the campaign itself and for supporters acting on their own, and the campaign eventually maintained official profiles on some 15 different online social networks (accumulating five million “friends” in total). Obama's staff worked with other online communities as well, reaching out directly to build relationships and shape coverage in the progressive political blogosphere. The campaign used online video extensively, producing some 1800 separate clips posted to YouTube and BarackObama.com, and also found Google Ads to be a very effective way to catch potential donors and

volunteers as they searched the web for political information.

Grassroots Outreach/Data Collection

Almost invisible from outside the campaign itself, the grassroots system combined experience gained from past database-driven voter contact experiments with a replicable grassroots organizing model and internet communications to create a neighborhood-level political juggernaut.

Volunteers across the country (but particularly in battleground areas) trained in person and online to work in their own communities, downloading “walk lists” of houses to visit in their neighborhoods and placing calls assigned through online “virtual phone-bank” applications.

The campaign in turn trusted them to update the overall voter outreach database with the results, complementing polling data with massive amounts of overnight information and [providing the Obama leadership with priceless insight into how their efforts were playing out on the ground](#). On election day, the outreach and data-collection operation morphed into a voter-turnout operation, helping to deliver Obama victories in traditionally Republican areas and states.

Text messaging/cell phones

Structural constraints in the telecom industry still limit the use of cell phones as a mass communications tool in U.S. politics, but individual Obama supporters and organizers of course used text messaging, video and voice calls extensively in their own personal outreach. The campaign also amassed a central list of roughly one million cell numbers and used SMS text messages to promote voter turnout as well as to make campaign announcements such as Joe Biden's selection as Vice President. Campaign staff also relied on cell phones to reach segments of the population less likely to be on a computer regularly, such as young people, minorities and the poor.

A Movement or Not?

“In this Internet era, it’s not enough to run a campaign; you need to lead a movement,” Mindy Finn, a Republican online political operative, told me less than three days after the election.

[“Politics Is No Longer Local. It’s Viral.”](#) Jose Antonio Vargas, Washington Post, 12/28/08

One conclusion some have drawn from the last few years of internet politics is that future political campaigns MUST transform themselves into movements driven by mass enthusiasm if they hope to win elections. Well, maybe — but plenty of people not named Barack Obama and not boosted by a vibrant and extensive network of active supporters also won on November 4th, and it strains credulity to think that every race for city council, school board or even Congress will swing on which candidate most effectively mobilizes an internet-driven grassroots army. Even for online “movements” at the presidential level, the overall results are mixed: Obama may have won, but Dean didn’t in 2004 — and neither did Ron Paul in 2008.

But who cares? Whether they use it to build a movement or not, the internet gives individual people and groups large and small the potential to have a profoundly loud voice. For example, whoever put the video of the Reverend Wright’s rant on YouTube or sent the first “Obama-is-a-Muslim” email committed a political act as influential as any other in this long election season.

In any case, hard experience shows over and over that online tools don’t care who uses them, and I suspect that those who don’t remember the history of the Obama campaign are doomed to get repeatedly walloped by those who do. So with that in mind, let’s look at the lessons of 2008 in more detail, starting with what we can learn from how Obama organized his campaign staff.

2. Learning from Obama's Campaign Structure

How to Organize for Success

Structure isn't sexy, but to talk about the online tools of 2008 without discussing the framework that governed their use brings to mind a certain metaphor about forests and trees. ANYONE could employ most of the technology the Obama campaign used, but very few online communicators have ever done so either as effectively or on such a scale. One important lesson from 2008: the tools you use don't matter as much as how you use them.

For Obama, Online Communications was Communications, Not Technology

For starters, Obama's new media department was NOT a part of the campaign's tech team. Instead, it was an independent branch of the campaign, coequal with communications, field and finance, and was in fact as much a client of the technology folks as, say, the press department was. Like other department heads, new media team leader Joe Rospars was a central part of the campaign's top-level planning and decision-making processes, and he reported directly to overall campaign manager David Plouffe.

In early 2007, Genachowski brought in Rospars, who co-founded his own online consulting firm and worked on Dean's online-fueled campaign, to be the campaign's new media director, and Kevin Malover, a veteran of online travel agency Orbitz, to be chief technology officer. In an interview in May 2007, Genachowski told us: "We may be the only campaign with a full-time chief technology officer." While Rospars was in charge of the entire political operation, Malover helped build software and took care of integrating data and voter files.

["Obama Raised Half a Billion Online,"](#) Jose Antonio Vargas, Washington Post, 11/20/2008

Contrast this with the arrangement at many other campaigns and advocacy groups, in which the online communications team is buried in a basement and often excluded from the communications planning process until its final stages, leaving the online element an afterthought with a stunted chance at success. Plus, their colleagues often lump online communicators in with "the techies," expecting them to be able to fix a computer or configure a network as well as to run a coordinated email fundraising campaign — which is about as logical as demanding that your freelance writer be able to fix a printing press.

Obama's campaign managers employed a completely different model. They saw that online organizing has become as central to modern political campaigning as direct mail, field organizing, advertising and media relations, and that the internet can in fact become the backbone of campaign functions from fundraising to turning out voters on election day. Miss that point, and you miss one of the central lessons of 2008.

Online Communications Was Integrated across Entire Campaign

Separate and equal, but also integrated: notwithstanding its distinct place in the campaign structure, the Obama new media team worked directly and daily with their colleagues in other departments. For instance, the grassroots/field team had staff working at desks in the new media section at the same time that the new media team had staff working at desks in grassroots/field offices — reflecting a drive throughout the campaign to break down the barriers that usually exist between competing elements of a political campaign.

To that end, Rospars and his colleagues essentially built a “shadow” field team that worked with the field organizing, new media AND technology folks alike. Likewise, the new media team’s online fundraising section actually had more staff than the official campaign finance arm by election day!

This level of integration applied to technological as well as to human systems. For instance, the grassroots volunteer-management software connected with the voter database system built for Get Out The Vote operations, letting volunteers update information directly — getting more value out of every individual voter contact. Online outreach methods also reinforced each other: videos motivated supporters to work harder, while the blog, email list and social networking outreach helped drive video viewership, fundraising and recruitment. Email drove fundraising, encouraged volunteers and maintained the long-term relationships that kept supporters by the millions attached to the campaign.

The website tied it all together, serving as a base for recruitment and volunteer action. And because of the need to design that website and other online imagery, the campaign gained another advantage rare for political communicators: good and consistent branding. Obama's new media team included talented and experienced designers, who created a logo and identity package that the campaign deployed with a rigor most corporate brand experts would envy. From online ads to print materials, yard signs and wraparound graphics for buses, the new media team turned out most of the visual material used across the country, saving some \$10 million on outside consulting fees while also helping to build the clear and identifiable brand “Obama.” An indicator of how good a job they did: take a good look at that new Pepsi logo.

Measure, Cut, then Measure Again

From the the ethereal heights of branding to the dreary valley of numbers:

Obama's campaign tracked the success of every e-mail, text message and Web site visit, capitalizing on the analytics that are inherent in digital communications. Each ad and e-mail was created in multiple versions (e.g., different headers, buttons vs. links, video vs. audio vs. plain text) to test what worked and what did not. The campaign developed more than 7,000 customized e-mails, tailored to individual prospects, and made real-time improvements to its outreach materials. Adjustments were made daily to improve performance and conversion. It worked. As the campaign progressed, the effectiveness of the e-mail campaign increased and conversion rates similarly improved.

["The Social Pulpit: Barack Obama's Social Media Toolkit,"](#) Edelman Digital Public Affairs, January 2009

Measurability was so important to the Obamans that it actually influenced tactical choices: Rospars has mentioned that the campaign ran relatively few display ads (classic billboard-style online advertising) compared with search/contextual ads (Google Ads), concentrating their spending on what they could "measure and count" rather than on "amorphous" messaging goals. The point: what's the use of doing something you can't test? If you can't test it, you don't know how much good it's doing you, and your money might be better spent elsewhere. In that vein, Joe Rospars has likened the Obama analytics team to the Government Accountability Agency, which acts as an auditor and watchdog for the federal government.

The core role of analytics in guiding new media outreach neatly illustrates the broader Obama campaign's pragmatic and self-correcting approach. In this case, the staff realized that tweaking, streamlining and optimizing the details of supporter recruitment and management would yield more concrete benefits than developing

any particular piece of gee-whiz new technology — a mantra other online communicators should recite every night before bed.

Volunteer Management — Context, Training and Accountability

How the Obama field operation organized their volunteer teams deserves special mention, in part because their grassroots GOTV technology depended on it and also because it provides an excellent model for community-based organizers of all flavors. The structure evolved in the primaries and went national during the general election season. Its critical features:

- The campaign developed a clear team structure for the volunteer operation, replicable just about anywhere and with standard roles for each member. Each volunteer team included a leader (to hold everyone accountable), a data manager (because data doesn't exist unless it gets in the system), a phone bank coordinator, a campus coordinator and a volunteer coordinator.
- Training was absolutely vital, both for team members and for the individual neighborhood volunteers they organized.
- Teams had clear vote-getting and voter-contact goals and were held accountable for them.
- Example: for the general election, the Obama organization fielded 400 teams in the state of Missouri, supervised by paid campaign staff, with each team covering 8-12 voting precincts and starting work weeks or months before November 4th.

One thing stands out about this system: it required a lot from volunteers, both in terms of training and in actual sweat. To keep them working, the campaign was careful to let them in on the kind of strategy details that campaigns usually strive to hide. One trick to motivating people: let them know how their efforts fit into a larger framework, in this case via David Plouffe's online video briefings, so that they know that their work has context and is actually valued. If you want to create a successful national grassroots outreach effort, focus on context, training and accountability. I.e., take your people seriously and they'll return the favor — they want to know that they aren't just blindly making calls or knocking on doors.

The T-34, not the Tiger

It's hard to think of any organization that raises several hundred million dollars as "rough and ready," but that description does seem apt for the Obama online campaign. They rarely seemed to aim for immediate perfection, but instead built tools that were needed and that worked, and then incrementally improved them through testing and experience.

As a military history nerd, I'm reminded of the tanks of World War II — the Russians built a standard model ([the T-34](#)) that was good enough, easy to manufacture in huge numbers and easy for draftee farmboys to learn to use (the Americans solved the same problem with the [Sherman](#)). Their German counterparts, by contrast, scattered their work among many projects and tended to prize engineering virtue above practicality, yielding tanks like [the Tiger](#) that may have been individually superior in battle but were few in number and often "[white elephants](#)" that broke down in the field. Guess who won? Scalability and usability mattered more than mere technological brilliance!

Now that we've talked about structure, let's put it to work — how did the Obama campaign find and keep support online?

3. Learning from Obama's Online Outreach

How to Find and Build Support on the Internet

With a team in place and technology under development, the Obama campaign wasted no time in building their most important resource: the list of volunteers who would work to elect the Illinois senator president. And just as the campaign would use new media tools to encourage voter turnout and other action in the real world, they built their list of online activists in part at physical events:

Field teams used various tactics, including collecting addresses at events, via online advertising and by offering incentives such as a free bumper sticker in exchange for contact information. Often, after collecting addresses, follow-up emails steered people to MyBarackObama.com, where they could find information on how to host events themselves.

["Obama's Road To White House Was Paved With Emails,"](#) David Goetzl, Online Media Daily, December 9, 2008

Once again, integration was key — offline recruiting ("BarackObama.com" backdrops at speeches, the URL's prominent placement on yard signs, block-walkers trudging through their neighborhoods) yielded online activists, which in turn yielded more recruiting in the physical world. For all the attention we'll pay to online outreach, remember that much of the work of building Obama's supporter list took place face-to-face.

Online Video

Of course, if you can't reach someone in person, video is often the next best thing. It's immediate, it's engaging, and it tends to evoke a much stronger emotional response than text and images alone — video feels more “real.” And the Obama campaign used video extensively: from very early in the race, his team already included a videographer and screenwriter/producer squad to shoot footage both for internal/documentary purposes and (more importantly) for use in public as a persuasive tool. By November 4th, [they'd posted some 1800 separate clips on YouTube, generating over one BILLION minutes of total viewership.](#)

Many of the videos (such as David Plouffe's periodic online briefings) were intended for existing volunteers, but others were designed to deliver targeted messages to specific groups of potential supporters. And as with so many other online outreach tools, supporters took the reins themselves, in some cases creating pro-Obama videos that were seen millions of times. But even the ones that WEREN'T viewed by millions mattered: the internet is an endless sea of niches, and not only was it impossible for the campaign to target every possible interest or audience, they didn't need to — their supporters were busy doing it for them, and in their own (authentic) voices. [My own sister-in-law switched her allegiance from Hillary Clinton to Barack Obama](#) in part because she watched a video created by Lawrence Lessig, a Stanford law professor and online thinker whom she greatly respects.

Online Social Networks

If you read some of the more breathless coverage of the internet's role in politics as the race unfolded, you might get the idea that Facebook and MySpace were the beginning and the end of online politics in 2008. And it's true that Obama and the

other presidential candidates found these sites to be fertile soil for supporter harvesting, at the very least because so many Americans spend so much time on them. It's a classic observation: if you want to find supporters, [go where they are](#) — and a lot of people are on social networking websites for a lot of hours every day. But the Obama outreach team kept public socnets in perspective, investing resources in them but not to a distracting extent, and worked hard to move new recruits found there into the campaign's overall volunteer structure.

Obama limited his official presence to 15 [online social networks] and leveraged these platforms to direct people to the MyBO Web site, where the campaign had a greater ability to channel people to the specific activities and causes that were deemed the most important to fulfilling the campaign's electoral strategy.

["The Social Pulpit: Barack Obama's Social Media Toolkit,"](#) Edelman Digital Public Affairs, January 2009

But the campaign's own official presence was only a slice of the pro-Obama activity to which these sites played host, since millions of Obama's "friends" were also evangelizing on his behalf on their own:

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

["The Social Pulpit: Barack Obama's Social Media Toolkit,"](#) Edelman Digital Public Affairs, January 2009

Besides its main Facebook “Fan Page” and the “One Million Strong” group, the campaign actively [encouraged supporters to create their own Facebook Groups based on location or interest](#), realizing that these separate groups expanded Obama’s outreach rather than diluted it. The campaign also created a Facebook Application for fans to add to their profiles — like a badge or a button but constantly updated — which spread the campaign’s messaging directly through natural channels as friends interacted with friends.

The Obama campaign invested in other site-specific tools besides the Facebook App. MySpace allows users to customize their profile pages to a much greater extent than Facebook, for instance, so Obama’s staff created an array of buttons, badges and widgets for supporters to add — like virtual yard signs, they advertised the candidate by just sitting there on a page. The campaign’s ultimate goal was to use to use each Facebook/MySpace supporter’s profile page as a communications hub within that supporter’s own social circle, building up up volunteers and donors friend-to-friend.

And as the campaign worked in other social networks such as Black Planet, they adapted their approach to meet the particular rules, requirements and customs of each site — every network is different and requires a different approach. Of course, it didn’t always work smoothly, as when [the professional staff took over a volunteer’s MySpace page early in the campaign and encountered a sharp backlash](#). But that stumble and any others were only minor hurdles — and [unlike John McCain, at least Obama didn’t have his MySpace profile hacked](#).

Email

Though immensely popular, social networking sites still didn’t reach everyone online in

2008, and I suspect that they achieved some of their prominence in media coverage of the election because they were visible — you could SEE how many “friends” Barack Obama had at any given moment, and you could SEE it when thousands of people changed their middle names on Facebook to “Hussein” in solidarity against Republican attempts to brand him as “other.” But just about everyone with internet access uses email, regardless of age, and [research from the E-Voter Institute](#) published in the summer of 2008 found that people were significantly more likely to send or forward political email than they were to reach out via Facebook or MySpace.

Another data point: many websites (including Epolitics.com) have employed the “ShareThis” widget to encourage readers to forward content or post it to social sites, and stats published by the folks at ShareThis in August of 2008 showed that [email-forwarding still dominated their widget's use across the web](#). We'll never know how many Obama supporters bombarded their friends and relatives with emails on his behalf, but we shouldn't forget them or discount their ultimate effect because their work was invisible to outsiders.

Online Advertising

By November of 2008, Obama's new media team had spent some \$16 million to buy ad space on the web, most of it devoted to list-building:

The presidential hopefuls relied on Web ads almost entirely for building supporter lists and garnering donations. Obama's ubiquitous “Join Us” call-to-action drove supporters to his site to sign up to volunteer, throw debate-watching parties, attend local campaign events, and, yes, donate. His campaign raked in millions of small payments from online donors, and we can assume much of that cash came in as a result of search and display ads and e-mails sent to those joiners.

[*“Web Ads Mattered More than Ever in '08 Election.”*](#) Kate Kaye, ClickZ, Nov 4, 2008

The campaign did run some influence-the-discussion display ads, for instance buying space on the websites of major media outlets immediately after debates, but they focused more on the practical goal of list-building. And that meant search ads, since [new media team head Joe Rospars has said that search ads yielded a Return On Investment as high as 10- or 15-fold](#), presumably measured in campaign contributions. And though Obama advertising team bought ads on some issue-based keywords, they found that targeting the obvious searches for “Barack Obama” was steadily and consistently effective. As elections approached, their strategy shifted somewhat:

As voting time drew near during the primaries, the Obama camp targeted ads to specific states, suggesting people click through to learn more about early voting, or find their local polling places. The same went for geo-targeted ads from both the Democratic National Committee and Obama’s campaign seen in recent months; those promoted voter registration and early voting. Obama’s ads pushing early voting even appeared in online games leading up to the election.

[*“Web Ads Mattered More than Ever in ‘08 Election,”*](#) Kate Kaye, ClickZ, Nov 4, 2008

Many other political communicators working in both the electoral and advocacy spaces have found search/contextual ads to be extremely effective for list-building, and they’re likely to be a first consideration for online political advertisers over the next few years.

Political Blogs

Remember 2004, when blogs were the darlings of the political world, king-makers in the waiting? Fast-forward a few years and every one of the major political campaigns dedicated time and resources to reaching out to bloggers and their

communities of readers. Many candidates “wrote” (i.e., probably had their staff write) posts for prominent blogs, hosted conference calls for bloggers and paid close attention to what bloggers and commenters said about them. The Obama campaign was no exception, but to a great extent, it didn’t NEED the political blogs — because it was [building its own independent base of zealous supporters](#).

In a sense, Obama could do an end-run around the top-level progressive blogs, adding their readers to his own network by reaching them through other channels. He didn’t ignore the blogs, but he could afford to keep them in their rightful place — as particularly influential voices and as gathering places for potential supporters, but not as the be-all and end-all of online outreach.

Catching ‘em When They Come to You

Of course, for all of his campaign’s aggressive outreach, plenty of Obama’s donors and volunteers found him on their own, either through a web search or by going straight to BarackObama.com. And as we discussed earlier, the website was a supporter-grabbing machine, encouraging visitors to sign up from their first click. BarackObama.com was easy to find, easy to navigate and provided links to volunteer tools on essentially every page, and its designers tried never to miss a chance to turn a visitor into a convert.

Next up: let’s put all those new supporters to work.

4. Learning from Obama's Volunteer Army

How to Put People to Work on Your Behalf

Attracting the largest army of supporters ever seen in a modern American election is one thing, but even more impressive is that the Obama campaign managed to put them to work — as online recruiters, as cash machines, but also as organizers, block-walkers and pro-Obama voices in their own communities. A critical problem for anyone running for office: if all you ask volunteers to do when they show up at your campaign headquarters is to stuff envelopes, their ranks are likely to melt away like the morning dew as they find better uses for their time. The Obama solution: borrow their brains, and use technology to make it possible. In part, this was through the MyBarackObama.com toolset:

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

["The Social Pulpit: Barack Obama's Social Media Toolkit,"](#) Edelman Digital Public Affairs, January 2009

We've already looked at the campaign's grassroots-organizing model, which required a tremendous investment in time from — and an immense amount of trust in — volunteer team members and their recruits, but the Obamans ventured out onto plenty of other ground on which political campaigns normally fear to tread. When volunteers were ready before professional staff arrived in a state, for instance, the campaign let the locals represent it in public, including to the news media — something that would send shivers down the spine of a traditional campaign staffer.

When outreach is based around volunteer commitment rather than on strict message control, training becomes particularly important, since volunteers will need to learn to do everything from planning events to motivating slackers. Obama's staff held many in-person organizing sessions and bootcamps, but they could also depend on internet video to deliver lessons at any hour of the day. Plus, video helped disseminate messaging points and showed volunteers how their work fit into the broader context of the entire campaign. For Obama, trusting volunteers to communicate face-to-face with local voters, opinion leaders and the media was a natural extension of his community-organizing ethos — but it was online technology that made it work on a national scale.

Countering The Smears

Though well-armed and feisty, Obama's supporters weren't alone online, and his campaign was forced to spend more time and money countering narratives spread by critics than any of his staff would have liked. The Obama-is-a-Muslim-Manchurian-Candidate email chains took off just about anywhere the gullible had access to a “forward” button, and they flew in formation with other messages, blog posts and videos that accused Obama of everything from socialism to racism to [a lack of gratitude.](#) Once again, Obama's volunteers helped come to the rescue, and once again by working within their own social circles:

The campaign also launched web pages and online action groups to fight the underground, e-mail whisper campaigns and robo-calls that surfaced in battleground states. In one effort, the campaign urged supporters to send out counterviral e-mails responding to false rumors about Obama's personal background and tax policies.

[“Propelled by Internet, Barack Obama Wins Presidency,”](#) Sarah Lai Stirland, [Wired.com](#), 11/4/2008

I.e., when your uncle sent that crazy anti-Obama email to you and 30 other people, you learned to politely reply-to-all with links to articles that countered the distortions. Multiply that by a few million activists, and the Obama campaign had access to a better antidote to backstage smears than any television commercial could provide.

Social Media Activism

The Obama model may have emphasized putting people to work in their physical communities, but why stop there — as we've seen, his supporters were going to spread the word in the virtual world as well as next door to home. And the campaign was happy to give them both the source material necessary and the channels to promote the results:

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

The campaign could not possibly have generated this much content on its own. **And it was better that it didn't.**

["The Social Pulpit: Barack Obama's Social Media Toolkit,"](#) Edelman Digital Public Affairs, January 2009

Why better? Because research and experience consistently show that the most effective persuasion comes from our peers, our friends and our family. And that's in turn in part because individual people know how to speak in the vernacular that's right for their audience — college students know how to talk to college students, moms know how to talk to moms, and [techies know how to talk to techies](#). Of course, you have to trust them all to represent you well, but that was a potential that the

Obamans not only embraced but celebrated.

Data Collection

One result of all of that list-building, block-walking and phone-banking? Data, lots and lots of data about what potential voters were thinking and about what they were planning to do on election day. This flood of information — updated constantly as elections approached — not only supplemented the campaign's internal polling, but at times (including during the run-up to the Iowa Caucuses) provided a more accurate view of the electorate:

“We had a lot of voter identification work. We had a lot of field data. So we'd put all that together and model out the election in those states every week. So we'd say, okay, if the election were held this week based on all our data, put it all in a blender, where are we? And obviously, with technology today, we could measure this very carefully. We don't have to wait for a state to report in how they did that night; we can look at it, down to the volunteer level, because we trusted our volunteers. We gave them the voter file, we said here are the people on your block, you go talk to 'em, you record the result of the conversation. We in Chicago could look at that...”

Obama Campaign Manager David Plouffe, [speaking at a post-election event broadcast on C-Span](#)

From modeling to action was a simple but decisive jump, and Obama's campaign managers made serious resource-allocation decisions (including where to send the candidate, where to send surrogates and where to concentrate advertising) based on volunteer-supplied information up until the last hours of the race. No presidential campaign has ever had access to voter data on this scale or updated this constantly, and it gave Obama's staff an edge their opponents may not have recognized even existed at the time. And it was only because they trusted their

volunteers to edit a database.

Getting Out The Vote

All the months of “fun” notwithstanding, a campaign lives and dies for election day — and the ultimate goal of all of those volunteer hours was to turn out voters on November 4th. Nationwide community organizing fed the final Get Out The Vote frenzy, assisted by online reminders:

On Election Day, the campaign used its massive list for a get-out-the-vote effort. Emails provided people with the names of five others who supported Obama and asked them to call each one to ensure they were going to the polls, and offer a ride if need be.

*[“Obama’s Road To White House Was Paved With Emails,”](#) David Goetzl, *Online Media Daily*, December 9, 2008*

Not just emails, but also the last in a long chain of text messages:

On Election Day, every voter who’d signed up for alerts in battleground states got at least three text messages. Supporters on average received five to 20 text messages per month, depending on where they lived — the program was divided by states, regions, zip codes and colleges — and what kind of messages they had opted to receive.

*[“Obama Raised Half a Billion Online,”](#) Jose Antonio Vargas, *Washington Post*, 11/20/2008*

As we’ve seen, even Obama’s online advertising turned to rallying voters during early balloting periods and on election day itself. A last-minute addition to the arsenal: the campaign’s new media and tech teams managed to turn out a very efficient online

polling place finder on a short deadline just in time for the general election, which they promoted via online ads, the email list and direct voter contact. Obama's victory was built on a long series of technological innovations like this one — most of them relatively insignificant on their own, but decisive in combination.

Next up, we'll look at the most decisive of all: the fundraising.

5. Learning from Obama's Financial Steamroller

How to Raise Money Online

Obama's platform may have envisioned a grand reform of the political system, but the primary change he brought to political fundraising was to do more of it than anyone in history:

3 million donors made a total of 6.5 million donations online adding up to more than \$500 million. Of those 6.5 million donations, 6 million were in increments of \$100 or less. The average online donation was \$80, and the average Obama donor gave more than once...Obama also raised millions from traditional campaign bundlers — rich, well-connected fundraisers — but the bulk of the more than \$600 million that Obama raised throughout the campaign was through the Internet, aides said. (Some of those bundlers, of course, also arranged for donations to be made online, so there is some overlap.)

["Obama Raised Half a Billion Online,"](#) Jose Antonio Vargas, Washington Post, 11/20/2008

That last line is key: "online" doesn't necessarily mean "small." In fact, [early in the primary season Obama had already assembled a network of big-money bundlers,](#) fundraisers who tapped social and business connections to solicit large checks from other wealthy people. Obama's big donor program [accelerated as the general election approached,](#) and regardless how many millions of small donations arrived over the internet, the bulk of the cash he raised in the end — some 75% — [came from people who gave \\$200 or more](#) over the course of the campaign.

Let's tease two different ideas out of these numbers. First, it helps a campaign immensely if most individual donations, even the big ones, come in online rather than

as paper checks. Money collected via credit cards is available instantly, allowing a candidate to take immediate advantage of an overnight surge in income. Plus, online donation details automatically end up in a database, simplifying accounting and reporting — a serious concern in a campaign environment in which the press and bloggers pour over a candidate's FEC filings online.

By contrast, physical checks present an immense logistical burden, since each one has to be processed individually whether it's collected at a fundraising dinner or arrives in the mail. Had Obama's financial tsunami come in on paper, the process of opening, logging and depositing it would have overwhelmed just about any political staff in the pre-internet era. The time delay might have been equally fatal, as Gary Hart found out after winning the New Hampshire primary in 1984, when a surge of donations arrived too late to help in the next round of elections.

Another point: many (most?) Obama donors who gave more than \$200 did so over the course of months rather than all at once. They tended to part with relatively small amounts repeatedly, which in turn is why a small-donor list is such a valuable resource — it's the gift that keeps on giving, quite literally. Unlike traditional big donors who often reach their quota for a given candidate with a single check, small donors can contribute repeatedly, providing a financial consistency that's priceless in a years-long campaign.

This dynamic was already apparent on the Democratic side of the presidential race by September of 2007: Hillary Clinton's strategy of wrangling big money from traditional Democratic sources was beginning to max out, but Obama was able to return to his much larger list of grassroots donors again and again. By 2008 and the general election, his enormous pool of donors and volunteers provided Obama with a tremendous advantage over John McCain, with results decisive both financially and at the polls.

Of course, Obama's supporters didn't give that money all on their own — they were the target of a series of emails and other contacts stretching over the course of a year or more.

Cultivating the Grassroots

As we've already seen, [the Obama campaign turned volunteer mobilization into a science](#), and it's no surprise that they took equally great care in managing donors. The main tool they used to solicit money? Email — it's not hip, it's not sexy, but it absolutely worked. Of course, every communications tool from direct mail to Facebook no doubt played a role, but the campaign's fundraising workhorse was a combination of email and a website — some three-quarters of the money they raised online was directly attributable to an email solicitation.

While anyone can send out a message asking for money, it takes a professional operation to manage virtual relationships with millions of people over a period lasting many months without burning them out in the process. Any activist database experiences "churn" as old members drop off and new ones join, but mismanagement can turn churn into flight. The Obama solutions: analytics, technical skill, experience and tactics.

You WILL be Tested on This

Just about everything in the Obama campaign's mass emails was subject to testing and refinement, from sender's names to subject lines, topics, text, imagery and link placement. Campaign staff would frequently break their supporter list (or a sample of the list) into several randomized groups, whose members would then receive different emails based on the message or feature being tested. Or, staff analysts might segment the list demographically, breaking down responses to particular messages

based on supporters' age, location, donation history or other characteristics.

Once they had results in hand (messages opened, actions taken, donations made) and cross-referenced with the list demographics, the team could apply this information to the next round of emails...which in turn yielded more testing data which yielded more messages which yielded more testing data and so on.

Multiply this process by 18-plus months of list-management, and you can get an idea of the volume of measurement involved in the email component of a presidential campaign. In fact, the long Democratic primary season turned out to be a boon for the Obama online analytics team, since it gave them the opportunity to slice and dice their data in every state across the country, providing a solid foundation for the Fall general election turnout operation.

The Skills that Paid the Bills

To write those fundraising and motivational messages, the Obama campaign built up a cadre of skilled experts. Former speechwriters had a particular edge, since they'd had practice at capturing another person's voice, but just about everyone involved improved from the constant practice — it turns out that if you write mass emails 20 hours a day, you get good at it.

Because of the importance of this specialized skill, most individual messages came from the national office rather than from state organizers, regardless of who appeared to send them. The campaign's email staff steadily expanded as the campaign progressed — according to Joe Rospars, new writers paid for themselves within a matter of weeks by boosting donations. What did they learn that made them so valuable?

Basic Principles Behind Obama's Email Fundraising Success

The Obama campaign's email strategy, and like so much else the campaign did online, built on the experience of previous political campaigns and nonprofit advocacy groups, relying on incremental improvements over past practice.

- A key idea: the three Ms of political email are messaging, mobilization and money.
- Emails should perpetuate core messages of the campaign.
- Emails must also do no harm — list managers must take great care not to alienate people on the list.
- Email activism is really relationship-management, since people's propensity to vote, volunteer and donate is based on the feelings they have toward a candidate or cause.
- The more personal, informal and direct a message is, the better — usually.
- Targeting helps get the most out of a list — in Obama's case, supporters might receive messages with different content based on their state or congressional district, their interests, their demographics or their past pattern of actions on behalf of the campaign.
- The campaign tried to develop relationships between the people “sending” the email and the people opening the email. A given message could have many apparent senders, with list members receiving emails “from” a campaign staff member they might actually have a chance to meet, for instance a

regional volunteer coordinator.

- The email initiation sequence was critical to starting the process, with new list members receiving a pre-set series of messages after they signed up. The sequence steadily “scaled the ask,” encouraging newbies to step deeper and deeper into the Obama waters — first they might show up to phone-bank, and a few weeks later they found themselves devoting 30 hours per week to managing a volunteer team.
- Besides scaling the ask, Obama fundraisers also “tailored the ask,” for instance soliciting different amounts based on a person’s donation history — a \$10 donor might be asked to donate \$20 the next time around, but someone who’d donated \$150 was safe to hit up for \$200.
- The campaign also “varied the ask” — as we’ve discussed, not every communication from the candidate or his surrogates begged for money. Some delivered talking points, others provided strategy or context, while many were straightforwardly inspirational. Obama did not treat his supporters as ATMs!
- When possible, staff mapped out email narrative arcs in advance. For best effect, each message had to stand alone but also be a part of the stream.
- The emphasis on narrative arcs didn’t preclude seizing on emotion and the moment, however. Sarah Palin’s Republican National Committee speech provides a great example, since by mocking community organizers she had functionally lashed out at everyone on the Obama list who’d embraced the campaign’s organizing model. Obama staff quickly sent out a message that gave them something to do about it, and they responded: Palin’s speech was followed by the biggest day of political fundraising ever — for Obama.

- Once again, [content integration was key](#):

Including compelling and heart-tugging videos in emails and on donation landing pages gave visitors an added push to take that next step and donate. One notable example was an email and video appeal from Ted Kennedy following his endorsement of Obama. The campaign used this message and video to make the most of an emotion-filled moment, given Senator Kennedy's illness and his historic endorsement.

["What Worked for Obama Can Work for YOUR Organization,"](#) Andrea Wood, M+R Strategic Services, January 2009

- The Obama campaign also understood the importance of the "value proposition of fundraising." They were careful to portray donations as doing more than just providing abstract support for the campaign — they made it very clear where money was going, and they often raised funds for a particular stated task such as running TV ads or supporting grassroots organizing in a given state.
- Despite the best targeting, different emails activated different people at different times. No one message had to connect with every supporter or every voter — if you miss 'em this week, you might get 'em next week.

How Much is Too Much?

One billion individual emails arrived in supporters' inboxes over the course of the Obama campaign. Why didn't the recipients flee his list in droves? Besides all the list-nurturing methods described above, Obama could also rely on the fact that his supporters understood WHY they were getting so many messages:

...If your list members perceive a specific situation or campaign to be urgent, you can bend the rules by sending far more fundraising appeals than your list members would normally tolerate.

For example, in the 60 days leading up to Election Day, the Obama campaign sent over 80 email messages to my email inbox. On October 30th, alone, I received a total of six messages from the campaign. That's an average of more than one email a day. Yet I did not unsubscribe because I understood why they were messaging me so heavily.

[“What Worked for Obama Can Work for YOUR Organization.”](#) Andrea Wood, M+R Strategic Services, January 2009

Again, testing is vital, and smart campaigns watch the rate at which supporters drop off very closely — unsubscribers are voting with their feet, or in this case with their fingers.

Viral Fundraising

A final aspect of the Obama fundraising machine was its peer-to-peer component, the personal fundraising campaigns individual volunteers launched through their MyBarackObama accounts, alongside [all of their other online outreach](#).

Supporter-driven distributed financial outreach raised a few tens of millions of dollars directly, but perhaps more important is that it helped mine individual fundraisers' social connections for new Obama donors, who would then find themselves on the main Obama list and subject to all of the encouragement described above. And of course, it provided yet another channel for priceless supporter enthusiasm and energy which would likely have gone to waste in the pre-internet era of political organizing.

The Decisive Edge

As for the end result of all of that enthusiasm, we already know the story: online fundraising allowed Barack Obama to opt out of the public campaign financing system and outspend John McCain by hundreds of millions of dollars in the general election. Online donations also helped pay for an internet-driven organizing machine that put millions of Obama supporters to work on their own streets in the days before the vote. Swamped by an ocean of money and an army of activists, Republicans were exiled from the White House and cast into the limbo of defeat.

But what about next time? Let's look at last at how the Obama lessons apply to other political campaigns now and in the future.

6. Learning from Obama: How to Move Forward

As the presidential race heated up, the internet grew from being the medium of a core group of political junkies to a gateway for millions of ordinary Americans to participate in the political process, donating odd amounts of their spare time to their candidate through online campaign tools. Obama's campaign carefully designed its web site to maximize group collaboration, while at the same time giving individual volunteers tasks they could follow on their own schedules.

["Propelled by Internet, Barack Obama Wins Presidency," Sarah Lai Stirland, Wired.com, 11/4/2008](#)

For all their zeal and the sophistication of the tools they had at hand, Obama's supporters weren't the only ones active online in 2008, nor was he the only candidate willing to trust ordinary people to carry his message. Ron Paul's supporters made an early splash, swarming internet discussion groups and the comments sections of national news outlets. Plus, they raised tens of millions of dollars over the web, pushing the former Libertarian far ahead of his Republican rivals on that score in the last quarter of 2007. [But Paul was a classic niche candidate](#), whose support would never spread far beyond a relatively narrow circle of activists. His online prominence serves mainly as an example of the internet's ability to amplify the collective voice of a small number of passionate people.

Every presidential candidate from Mitt Romney to Mike Gravel had a presence of some kind online regardless of how well they actually used it, though none built anything as comprehensive as Obama's. But even the best campaigns — including his — were doomed to be overshadowed at times by the voices of an unruly public. Despite the professionals' best efforts, the audience kept stealing the spotlight from the actors.

For instance, every serious candidate suffered from some piece of unflattering content spread online from person to person: McCain sang “Bomb, Bomb Iran,” Edwards had his two-minute hair-brushing episode, Clinton was greeted with children and flowers while landing “under sniper fire,” and a comparison of Mitt Romney’s past and current statements on abortion rights made for a fascinating study in contrast. Barack Obama was certainly not immune, particularly since his background set him up for persistent attempts to identify him as “other.”

In June, the alleged Obama “terrorist fist bump” went from viral to *The View* in just three days. Fortunately, the candidate was able to laugh it off, which was certainly not the case after the Rev. Wright videos went viral — another example of the unpredictable power of Web politics. More evidence: After wrapping up the nomination in June 2008, the Obama campaign launched an extensive Web site devoted solely to shooting down viral rumors and innuendo.

[“Obama, The ‘Revolution’ in Online Politics — And What Happens Next,”](#)
Greg Mitchell, *Huffington Post*, 2/4/2009

That website launched for a good reason, since the most serious danger Barack Obama faced after he’d outlasted Hillary Clinton in the primaries was this: that he would become seen as alien in enough people’s eyes that his hopes of capturing the political middle would fail. “Change” candidates have a particular need to convince voters that they’re a safe choice, as Reagan’s experience in 1980 shows — he ran very close with Carter until the debates, which allowed him to convince enough Americans that he wasn’t a crazed bomb-thrower. This burden of reassurance is even heavier for someone young, and (especially) for a candidate identified as black.

The Reverend Wright videos were therefore a tremendous danger, though of course Obama never appeared in them himself — it was the association with radicalism (and with Radical Blackness) that mattered. But at least they set him up for his speech

on race, one of the defining moments in his delicate assault on the American middle, and in that sense were a blessing in disguise. The Obama-is-a-Muslim emails were more insidious, since their effect had to be countered one-at-a-time rather than through a nationally televised speech, and the very act of denying them seemed to give them more credence in some people's eyes. Even months into his presidency, a significant slice of Americans persisted in believing that Barack Obama was either a secret Muslim or had been lying about his religious faith in some way.

As [the Macaca moment](#) showed in 2006, unflattering content can spread particularly far and fast when it gets caught in a feedback loop involving citizen journalists, corporate media outlets and the campaigns themselves:

Early in the final Obama-McCain showdown, a leading campaign charge from the Democrats was that the Republican wanted to stay in Iraq “for 100 years.” What was the source for this? An amateur video of McCain making a remark to that effect at a small campaign gathering months earlier, spread widely on the Web — in the usual fashion, first by liberal bloggers, then by the Obama campaign itself. Soon it turned up frequently on network and cable TV shows and even in Democratic commercials.

*[“Obama, The ‘Revolution’ in Online Politics — And What Happens Next,”](#)
Greg Mitchell, Huffington Post, 2/4/2009*

At times, the campaigns resembled ships on storm-toss'd seas, reeling from wave upon wave of words and images, occasionally buoyed up but more often all but drowned. The sheer volume of content that burst forth about the U.S. elections is astonishing, not least because of how much we have come to take it for granted. You don't have to be very old to remember a completely different political environment.

The first political campaign I paid close attention to was in 1992, when I was right out of college and working in Texas politics. My information sources? The three major networks and PBS (plus CNN when I was around a TV that

actually had cable) and the Austin American-Statesman. Maybe the New York Times when I bought it at a coffeeshop over the weekend. Once the Sunday morning news shows were over, that was essentially it for substantive political coverage until CNN's Inside Politics the next day...

Now? Political junkies can check dozens or hundreds of news sources every hour, both corporate-owned and informal. Cable news and talk radio have expanded dramatically, and they've joined with hundreds of thousands of online news outlets, advocacy sites, political blogs, email lists, podcasts and vodcasts to bombard us with information to the point that the problem isn't too little, but too much. From juicy scandals to the details of polling data and methodology, very few potential stories remain unexamined by somebody somewhere, and the biggest obstacle to a story's breaking big isn't the major-media filters but the difficulty of cutting through the cacophony and the clutter.

Of course this is obvious, but perhaps it's so obvious that we tend to forget about it. Internet political professionals often concentrate our attention on the particular tools we use to get our messages out, but the real effect of the Internet and the electronics explosion of the last 15 years has been the immense deepening and broadening of the sea of information in which we now swim. Our biggest task is just to get noticed as we drift along.

["What We Can Learn About Online Politics From the 2006 Campaign,"](#)
Epolitics.com, 11/8/2006

Future candidates and causes will face this problem no less, and many will sink without a ripple for every one that sails triumphantly into harbor. For online communicators trying to navigate rough waters, the Obama campaign will serve as a beacon for years to come — both a model and a guide — and an example of the potential of technology to translate the enthusiasm of millions of people into decisive action in the real world.

A Crystal Ball is a Dangerous Toy

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

["The Social Pulpit: Barack Obama's Social Media Toolkit,"](#) Edelman Digital Public Affairs, January 2009

"Obama built largest recognizable brand faster than anyone in history, with his supporters feeling that they had influence on that brand."

Michael Bassik, speaking at the 2009 South by Southwest Interactive conference

My friend Nate Wilcox likes to talk about the internet giving rise to a new form of machine politics, one built on distributed armies of online activists. This model contrasts with the classic 19th century-style American political machine, which was locally based: each thrived when it could deliver government services and political patronage in exchange for votes in a given city or neighborhood.

The urban political machine largely wilted away in the 20th century, and for a variety of reasons so did much of citizens' direct involvement in the political process. By the 1990s, they weren't seriously expected to participate substantively in politics at all, at least in most campaign professionals' minds. A voter's role began and ended on election day, and he or she was otherwise mostly just a target — of direct mail, pre-recorded phone calls, and an endless array of repetitive TV commercials.

The internet, though, is a different KIND of medium — back-and-forth rather than

broadcast — and the rise of such a participatory public space has completely changed the political media ecology, opening new niches to be exploited in turn by new kinds of organizing entities. Nate's 21st-century political machines would be a nimble breed, assembling to back a candidate or cause and maintaining influence to the extent that their supporters stay engaged, involved and active. [Some campaigns would be ephemeral, others would endure](#), but in most cases their limiting resource would be time — not necessarily their own, since staff can be bought, but that of individual people willing to donate a piece of their lives to what they see as a greater good.

Here's the thing: despite all the attention paid to the internet's potential for political outreach, it's an even better mobilizing tool. Television is still the best way to reach that great mass of potential voters who are NOT political junkies; it's a road running straight toward the Holy Grail of American presidential politics, the Independent Voter. Not surprisingly, the Obama campaign spent the bulk of its budget on television advertising, even though the money came in online, because they knew that TV commercials remain the most efficient way to reach the uncommitted and uninvolved.

But note what those Obama ads did: besides reinforcing the necessary imagery for that day and locale, they also directed people to go to a website for more information. They were recruiting tools, not just messaging tools, and like radio ads, direct mail, phone calls and that afternoon knock on the door, they played their part in building Obama's 13-million-member database.

Once people joined that list, as we've seen, each became an outpost — a nexus for organizing within a social circle. Elections are won at the water cooler, at the bar, at the dinner table, over the phone and in bed, and Obama's supporters were primed to know the messages, know the strategy and understand the stakes every time his

candidacy came up in conversation.

His online supporters were actually involved in what amounted to a carefully managed relationship with Barack Obama whether they realized it or not, one nurtured by a team of people whose lives revolved around that goal for almost two years. In the process, the Obama organization achieved both a scale and a level of effectiveness unlike any electoral campaign we've ever seen, and all because of one basic idea: that you can trust people to work on your behalf if you give them the tools and the training.

The campaign had the vision and the technology, while the activists provided the energy and the ceaseless work — they were Obama's key resource, the fuel for his entire ship. As Republican strategist Mark McKinnon put it at a 2009 South by Southwest panel discussion, Obama (and Howard Dean before him) weren't successful because they understood computers, they “were successful because they understood how to make technology harness the passion of their supporters.”

Stephen Geer, the Obama campaign's email team leader, [applied the pith of a veteran writer to the same dynamic](#): “You develop a strong connection with your supporters and you give them something to do about it.” The result, as the world now knows: an election victory for Barack Obama, a sea change in American politics and policy, and a model for online campaigners around the world. Not bad for some guy from Illinois with big ears and a funny name.

A Note about Sources

Where possible, I've linked to the relevant sources within the text of this series, and much of the material printed here derives from either the articles quoted or from other pieces listed in the [Further Reading](#). Members of Obama's campaign staff were notoriously reluctant to comment until after the election, however, and much discussion of the campaign before November of 2008 was based on what outsiders could see or on the rare glimpses given to professional journalists along the way. A more complete version had to await the lifting of the gag rule, though the Obamans were still a tight-lipped bunch eight months after the election.

Much of the inside information on the campaign's organizing model and internal structure, along with the extended discussion of email fundraising strategy, derives from talks given by Joe Rospars, Stephen Geer, Chris Hughes, Judith Freeman, Scott Goodstein and others at the 2008 Netroots Nation conference, the 2009 South by Southwest conference, the Politics Online conference, various DC-based post-election panels, and in particular RootsCamp '08 and other [New Organizing Institute](#)-sponsored events. Notes are available upon request, other than for hallway conversations and other moments strictly on background.

Further Reading

Still hungry? Find links to [more articles about Obama's online campaign at Epolitics.com](#).

About the Author

Colin Delany is founder and chief editor of Epolitics.com, a site that focuses on the tools and tactics of Internet politics and online political advocacy. Epolitics.com received the Golden Dot Award as “Best Blog - National Politics” at the 2007 Politics Online Conference, and Delany participated in DC Fox affiliate WTTG-25's live coverage of the 2008 general election night. Delany is also the author of the e-book [“Online Politics 101: The Tools and Tactics of Online Political Advocacy,”](#) which has been downloaded from epolitics.com over 20,000 times.

Delany started in politics in the early '90s in the Texas Capitol (where public service is considered a contact sport) and moved into the online political world in 1995. In 1999, during the first internet boom, he helped to start a targeted search engine for politics and policy, which lasted about as long as such ideas usually do. Since then, Delany has worked as a consultant to help dozens of political advocacy campaigns promote themselves in the digital world, and between 2003 and 2007 was the Online Communications Manager at the National Environmental Trust. He also plays bass in a rock and roll band.

Find out more about [consulting services from Colin Delany](#), or contact him at cpd@epolitics.com to arrange a training, webinar or presentation.