



RESEARCH NOTE

DIGITAL TOOLKITS FOR

CAMPAIGNING & ORGANISING.

2ND EDITION MAY 2018

We help build new forms of power for workers & communities.

Formed in 2015, Reveille Strategy works with Unions and other membership organisations on strategy, public policy, governance, change, capacity building, technology, message design, campaigning and organising.

Reveille works with organisations that are committed to helping their members make transformative change in Australia.

Reveille has worked with many of Australia's largest unions, and NGO's in the environment, refugee and social justice areas.

The Directors of Reveille (Tim Lyons, Troy Burton and Kristyn Crossfield) have more than six decades of experience in Australia's unions as organisers, leaders, educators and strategists at local, national and peak council level.

The name is a nod to Reveille for Radicals by the pioneering community organiser Saul Alinsky.

CONTENTS

1.

Introduction

Reveille's work with unions on technology.

2.

The Scope of Digital Change in Unions

Enhancement vs transformational change.

3.

Taxonomy of Tools

Tools in current use, key functionalities and use case.

FOR MORE INFORMATION CONTACT

Tim Lyons | tim@reveille.org.au | 0418 533 501

Troy Burton | troy@reveille.org.au | 0428 436 924

Kristyn Crossfield | kristyn@reveille.org.au | 0425 275 860

Madeleine Holme | madeleine@reveille.org.au | 0411 319 412

WWW.REVEILLE.ORG.AU

INTRODUCTION

In the current environment, all Australian unions are actively thinking about how to take advantage of new technology to organise and mobilise workers.

A big part of Reveille's work with unions is to select new forms of technology, ensure they work effectively with other union systems, and to embed them into operational campaigns (political and industrial).

This has included CRMS, Blast Phone and SMS tools, Peer to Peer SMS, Field Campaign Management and Digital Mobilisation Platforms.

Reveille has a partnership with OURWalmart to further develop and roll out advanced organising technology in Australia and to provide immersion training for Australian online organisers involving live participation in active US campaigns.

Our main joint project is the Australian roll out of WorkIt – an AI powered automated advice platform (accessible by Web browser, App and SMS) that is integrated with membership systems and is designed for community and group building, as well as implementing an online to offline organising strategy.

In relation to the acquisition and use of tech in the union context, there are a number of issues to be considered:

- The tension between single holistic platform, and key central crm with best of breed add-ons.
- The tension between data integrity and usability vs flexibility and customisation.
- Adapting political tools - e.g. nation builder - to workplace or industry organising is hard.
- Adapting tools developed overseas to the Australian context can prove challenging.

A key risk is that tools themselves drive tactics – we do it because the tool is built to do it. We need to use tools for what they are good at and that we need them to do.

Set out on the following pages is analysis by Reveille of the possible scope of digital change and a taxonomy of tools, prepared to assist Australian to consider these issues.



THE SCOPE OF DIGITAL CHANGE IN UNIONS.

Adapted for union context from “The Meaning of Digitization” (2016, CEB)

PRODUCT

Using data and technology to enhance existing models and services

Genuinely new models of membership, participation and or services

Changes to Membership or Services

Call centers
First gen CRMs

CRMS API link to other tech.

Automated advice (AI)
New forms of membership
Community creation online

CHANNEL

Improving channel coordination and performance

Transforming channels to match behaviors and preferences of target universe

Changes to Contact, Conversation, and Service

Basic websites
Online joins
Donations
Voter ID calls

Email list / petition builds
Blast SMS
Patch through calling
Use of models to target

Peer to Peer SMS
Community Creation
Online to offline organising & mobilisation

OPERATIONS

Improving efficiency of organisational processes

Genuinely new models of membership, participation and or services

Changes to Other Business Capabilities

Income automation
Low manual data input

Deep, real time data
CMS
Mobilisation tools
Event Management

Map and manage online and offline campaign activity

THE SCOPE OF DIGITAL CHANGE IN UNIONS.

Adapted for union context from “The Meaning of Digitization” (2016, CEB)

PRODUCT

Using data and technology to enhance existing models and services

Genuinely new models of membership, participation and or services

Changes to Membership or Services

Call centers
First gen CRMs

CRMs API link to other tech.

Automated advice (AI)
New forms of membership
Community creation online

CHANNEL

Improving channel coordination and performance

Transforming channels to match behaviors and preferences of target universe

Changes to Contact, Conversation, and Service

Basic websites
Online joins
Donations
Voter ID calls

Email list / petition builds
Blast SMS
Patch through calling
Use of models to target

Peer to Peer SMS
Community Creation
Online to offline organising & mobilisation

OPERATIONS

Improving efficiency of organisational processes

Genuinely new models of membership, participation and or services

Changes to Other Business Capabilities

Income automation
Low manual data input

Deep, real time data
CMS
Mobilisation tools
Event Management

Map and manage online and offline campaign activity

A TAXONOMY OF TOOLS.

Reveille has established a wiki for online collaboration on this kit. [Link here.](#)

FUNCTION

CRM (Customer Relationship Management)

Membership databases

PLATFORM

Salesforce
Unionware
Unison
Campaign Central (ALP)
Imis
Memforce

FEATURES

Member data, income management and fee payment, may link to industrial information, reporting.

USE CASE

Core requirement of membership organisations.
Reporting and accountability.

CMS (Content Management System)

Website platforms

Nationbuilder
Squarespace
Wordpress

Creation and management of digital content

House information, online actions, online join forms, supporter registration.
Cookies can be used to re-target online advertising to people visiting a website but not signing up.

Field campaign management

Manage organiser & volunteer field campaign work

Van/minivan
uorganise
Nationbuilder
Campaign Central

Track conversations & conversions
Mapping and planning
Reporting
Organising resources

Political and issues campaigns
Organising campaigns

Digital mobilising

Online mobilisation and advocacy tools

Nation Builder
Action Network*
Action Kit
Blue State Digital tools
Luminate
Megaphone*

Petitions
Advocacy emails and letters
Letters to the Editor
Event management
Fundraising
Payment platforms

Online mobilisation and advocacy tools

Email management

Nationbuilder
Mail Chimp
Campaign Monitor
Blue State Digital tools

Email communications, testing and analysis

A TAXONOMY OF TOOLS (CONTINUED).

FUNCTION	PLATFORM	FEATURES	USE CASE
Social media	Facebook Instagram Snapchat Twitter LinkedIn	Targeted online advertising, Facebook groups, member and supporter lead generation via online engagement.	Facebook groups can be used for organising and building online communities. Sharing information and actions, promoting mobilisations. Instagram, Snapchat and Facebook can all be used for targeted advertising to potential members and supporters. LinkedIn can be used to identify and contact potential members by industry.
Social media matching	Attentive.ly Searchisback.com Sociograph	See what members and supporters and saying online, identify influential social media users. Find people on Facebook based on location, job or mutual friends. Analyse and compare the social media activity level of your supporters.	Find and follow current and potential members and supporters online, match member and supporter data to public social media accounts to enable alternate ways of contacting people, identify potential activists and leaders.
Social media analytics and management	Hootsuite Google Analytics ShortStack	Manage social media accounts, track mentions, analyse results and reach. Message blast to large numbers of people	Optimise online engagement by tracking trends and learning what content generates the best responses and amongst which audiences.
Blast SMS	Callhub Twilio ReachTel*	SMS organising conversations	Outreach at scale for mobilisation, information sharing and voter outreach.

A TAXONOMY OF TOOLS (CONTINUED).

FUNCTION	PLATFORM	FEATURES	USE CASE
Peer to Peer SMS	yabbr* Hustle Relaytxt	SMS organising conversations	Organising, mobilisation, member to member/potential member conversations.
Automated and patch through phone calls	ReachTel CallHub	Automated landline and mobile calls. Optional patch through to call centres or publicly listed phone number	Outreach at scale for mobilisation and voter outreach. Transfer interested people through to an operator or call centre to have an in-depth conversation.
Automated member / supporter engagement	Autopilot Zapier	Connect various digital tools to allow them to share data across platforms. Automate follow up to members and supporters.	Direct advocacy calls to key decision- makers Add new supporter/member information to relevant email lists, automatically send new members or supporters a welcome email or SMS, automate congratulation messages when people take an action.
Automated advice and community creation	Workit	AI powered automated advice Web App and SMS access CRM connected Community / group building	Automation of industrial advice to organised workers Outreach at scale to unorganised workers Platform for group building

Reveille and OUR Walmart are pleased to offer Australian Unions a unique Digital Organiser development opportunity immersed in a live campaign in the United States.

About OUR Walmart.

OUR Walmart has pioneered Online to Offline organising techniques as the principle method of organising Walmart workers.

They have a small team pitched against the largest private-sector employer on earth, and have been spectacularly successful.

OUR Walmart continuously evolve processes, utilising new technology tools as they emerge, and build their own when there aren't any available. Success and progress is measured not by clicks, likes or shares, but by mobilisations, actions, and impact.

OUR Walmart focus heavily on peer-to-peer networking and worker to worker mobilisation.

To express interest, or for more information please contact:

Madeleine Holme: 0411 319 412
madeleine@reveille.org.au OR
Troy Burton: 0428 436 924,
troy@reveille.org.au

About the program.

Using a combination of Zoom virtual meeting technology and in person training, participants will learn about online to offline organising, strategies and tools.

This knowledge will be put into practice through immersion in live OUR Walmart campaign work.

OUR Walmart's Online to Offline campaign director – Eric Schlein – and Madeleine Holme from Reveille will provide training and briefing, and allocate campaign work.

Training Agenda.

Day 1

- Online to Offline methodology
- Campaign briefing
- Work allocation & campaign participation

Day 2

- Online to offline tools
- Application to own work
- Online to offline roles and data management
- Debrief and feedback

Participation details.

Participation is strictly limited each time the program is run and capped at 10 participants. To be accepted, participants will be required to:

- Be sponsored by an Australian Union
- Have experience with digital communications or organising
- Be assigned by their union to work on online to offline organising
- Be prepared to work to US time zones, for example beginning at 6am
- Commit to the full program, including debrief.
- Sign a confidentiality agreement

Fee: \$1200 plus GST (Proceeds support the ongoing work of OUR Walmart.)



DIGITAL PEER TO PEER WORKER PLATFORM

Developed by Organization United for Respect

WorkIt is a digital platform that provides people with instant information and support from trusted peers, augmented by Artificial Intelligence (AI), on how to deal with economic instability and workplace challenges that are a daily reality in low-wage jobs. WorkIt consumes vast, complex, and fluctuating collections of information on employment policy and rights and uses machine learning to create intelligent models to help serve, interpret, and distribute that information to users quickly, efficiently, and at scale. Users are able to access the information via a smartphone-based tool and SMS, which is the best way to reach workers with unpredictable schedules and disparate work sites in real time.

WorkIt's basic premise is to provide clear, relevant information to workers; connect them to peers to help collectively strategize towards a solution; connect individuals to a community of support to share lessons and look for opportunities to shift working conditions for a broader network; gather insights and analyze trends; and find new opportunities to apply data driven resources.

The **WorkIt** platform includes 2 user access platforms (mobile app access via Android / iOS and SMS access) with a third under development (website bot). There is also backend web based portal designed to assist staff and volunteers in the management of the overall service. The backend portal provides the interface to manage questions, answers, and users, as well as the retraining of the natural language classifiers / bots.

In these times, finding tools that increase communication and connection among your members or communities, while freeing up resources to focus on campaign work could not be more important. We believe in the potential of the **WorkIt** platform to transform how organizations support their members; reach new audiences; connect people to one another, as well as the work of your organization; and create a new, collective voice of power. WorkIt was developed by the Organization United for Respect (OUR), based on years of analysis, research, experience, and vision of reshaping practices to provide economic security for people in hourly jobs.

WorkIt is available as a white label product for organizations who wish to harness that potential. It can be configured and customized to serve your organization's content, brand, and membership, in order to maximize your impact by leveraging new communication pathways through mobile technology, machine learning, and messaging.

Reveille has a partnership with OUR to further develop and roll out **WorkIt** in Australia.

The first Australian iteration of **WorkIt** is now in live testing for United Voice casino members, under development for the SDA, and in early development for a range of other unions here.

FOR MORE INFORMATION CONTACT:

Tim Lyons | tim@reveille.org.au

Troy Burton | troy@reveille.org.au

Kristyn Crossfield | kristyn@reveille.org.au