



# QUICK START GUIDE TO WINNING YOUR ELECTION

## PHASE 1: HAVE YOUR MESSAGE READY

### Who are you?

**Campaign Bio.** This is not a resumé or a life history. A campaign bio is a collection of your experiences that show you are qualified and interesting to voters. Look for experiences from your life that relate to your key issues.

**Stump Speech.** What matters to you and your voters? Why they should vote for you? The first thing that people will ask is “Who are you?” and “Why are you running?” Have a good answer ready!

**Fundraising Pitch.** Write down the conversation you would like to have with a potential donor. Consider what matters to them and how you plan to address their issues. Include questions to find out about their issues. Be ready to ask them to contribute time or money.

**Candidate Photo.** Never underestimate the power of a good picture! Hire a great portrait photographer. Get a photoshoot of you and your family before the campaign announcement.

## PLANNING FOR SUCCESS

1. How many votes do you need to win?
2. Who are your voters?
3. How will you contact them?

Know your district. Do your research. Start talking with people today. Meet with local leaders. Ask for advice and introductions.

## PHASE 2: BUILDING YOUR ORGANIZATION

# You will need help.

Depending on your race and the expected size of the campaign, you have decisions to make regarding what your campaign team will look like.

**Your Kitchen Cabinet.** Choose a small group of trusted supporters to meet with regularly. You will need their support as you enter the public arena.

**Candidate.** The candidate has two jobs – talking to voters and raising the money necessary to win. Candidate signs-off on all campaign communications, including brochures, TV ads and mail pieces.

**General Consultant.** Responsible for general strategic advice. Works with the candidate to craft the campaign's messages. Attends campaign meetings and works with the team over the phone and email to assess opportunities and troubleshoot problems.

**Campaign Manager.** Responsible for all day-to-day operations. Manages the candidate's schedule and keeps the entire team on task. In smaller campaigns, the manager will assist in fundraising and accomplishing field goals like recruiting and managing volunteers.

**Fundraiser.** The candidate is the best person to ask for contributions but a paid fundraiser can make the process easier and more effective. Fundraising is a responsibility that needs to be filled either by the candidate, campaign manager, paid fundraising staff, or a volunteer.

**Field Organizer.** A field organizer's main responsibility is to contact voters either at the doorstep or on the phones. They set realistic weekly goals for volunteers or paid field staff.

**Volunteers.** Volunteers are the lifeblood of campaigns. In the absence of a volunteer coordinator, the campaign manager will be in charge of recruiting and managing the volunteers.

**Treasurer/Compliance.** You don't want to screw this up. Campaign contributions are subject to many state and local regulations. Campaign filings can be complicated, know and follow your state laws. If your budget is above \$50,000, we highly suggest hiring a professional treasurer.

Other consultants are available for hire. They include fundraising consultants, digital strategists, communication and earned media consultants, voter canvassing and field consultants.

### Financial Compliance Training

Most Election Commissions have guides on compliance and election-related document filings. They might even provide free trainings on how to use their systems.

For more info go to [www.CN4Partners.com](http://www.CN4Partners.com) or call 206.423.0120

## PHASE 3: HITTING THE CAMPAIGN TRAIL

# Ready, set-up, go!

Three important components to a campaign plan are:

1. Using your time efficiently,
2. Gathering support, and
3. Finding the resources you'll need to contact voters.

Many questions will branch out from these that will need to be answered. Through that process you will develop a plan that guides your daily campaign activities.

**Calendar & Scheduling.** Time is truly the only limited resource for a campaign. Use it wisely! Set up an online campaign calendar and share with team members. Schedule yourself for specific tasks (like fundraising call-time hours, doorbell ringing hours, and questionnaire hours).

**Endorsements & Questionnaires.** Endorsements by well-respected organizations will strengthen your campaign. Compile a list of organizations and who to contact to ask for their endorsement. Ask your supporters for introductions. It is very important to track initial outreach, contact notes, questionnaire completion, endorsement interview, overall result, contribution status, and other notes.

**Fundraising.** A strong fundraising pitch makes this easier. Compile list of everyone you know who you will ask for a financial contribution. Many candidates have staff or responsible volunteer sit with them to keep on task and on the phone. Set goals for number of calls and expected contributions.

Keep track of everyone you contact, when you talked to them, what you talked about and how much they donated. You may want to call them again – donors like to hear from you. Several database systems will keep track of your contacts and notes plus have an online contribution form, host your website and have mass email services.

Fundraising infrastructure includes a bank account, a website with an online contribution form to take credit cards, fundraising envelopes (that you can send out that are then easily sent back in), follow-up letter, and thank you letter (use the same written content for letters and email follow ups).

### Who endorses campaigns?

Labor Unions, some environmental groups (League of Conservation Voters, Sierra Club locals), progressive organizations, women's groups (Emily's List, Planned Parenthood, NARAL), local Democratic district organizations, community leaders and elected officials.

Be aware that most charities and non-profits cannot legally endorse political candidates.

## PHASE 4: VOTER CONTACT

# Reaching your voters.

**Targeted Voter Universe.** These are the voters that you need to contact and convince to vote for you. You probably can't personally contact everyone in your district, identifying all the voters you plan to reach will be key to your strategy.

Voter files provide voter data, can track your voter contacts, and be used to target voters for paid media.

**Field Activity.** One-on-one contacts and communications

- Set weekly goals for doorbelling and phone calls.
- Doorbellers will need handout, script, clipboards, maps, addresses, pens, smart phones (if using mobile technology)
- Phone callers will need phone number list, call script
- Record the result of all voter contacts!

**Debates and Meetings.** Debates, forums and community meetings are a great way to get your name and message out there to voters. Make sure to reach out to organizations that put on these events and track when they will be so you can attend. It is rare to be able to go to every debate and community meeting so get together with your team to prioritize which ones you should attend.

### Website.

- Domain name – buy your name if possible (www.JaneSmith.com or www.VoteJaneSmith.com or www.ElectJaneSmith.com)
- Homepage with donation button
- About You
- Endorsements
- Campaign Media – news articles, videos and photos
- Issue Statements
- Donations with an online credit card form
- Email List Sign-up
- Social Media Accounts
- Campaign Contact Info

### Campaign Materials and Advertising.

Your campaign will need printed information for you to hand-out to voters, and potential supporters at community meetings and door-to-door canvassing.

You won't be able to talk with every voter you need to win over. Paid media such as direct mail, online ads, and TV advertising will get your message out.

## CAMPAIGN CHECKLIST

# Before you announce.

- ☐ Key campaign messages, logo, and candidate photo
- ☐ Campaign committee name, address and bank account
- ☐ Press release and candidate photo for local media
- ☐ Simple website with a credit card processor
- ☐ Select a database and email management program
- ☐ Facebook and Twitter pages with links to your website
- ☐ Campaign Announcement Email
- ☐ Kickoff Party - *and the campaign begins!*

## Fundraising Databases, Voter Files, & Credit Card Processors

Name	Online Credit Card Processor	Fundraising Database & Tools	Voter File & Lists	Notes
Paypal	✓			
NGP/VAN	✓	✓	✓	Commonly used by democratic campaigns. Works well with Voter Action Network – the Democratic Party voter file and database includes party ID, scores, contact info, mobile app, phone banking & canvassing tracking systems. May be purchased from local Democratic party.
ActBlue	✓			Extremely popular donation portal. A bit expensive but more flexible than other portals – allows fundraising with other candidates and splitting donations.
NationBuilder	✓	✓	✓	Another common system has many website templates for easy 'Plug and Play.' Used by both political parties.
Complete Campaigns	✓	✓	✓	Web-based system with options as a fundraising database, online contribution form, and voter targeting with voter lists.
Labels & Lists			✓	Allows you to buy the contact names and data directly or use their platform.
Blue State Digital	✓	✓		High-end online system with robust digital tools. Can be expensive for smaller campaigns.

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CAMPAIGN STRATEGY + MEDIA



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