



# Activation Nation

## LESSONS FROM THE Obama Voter Engagement Campaign for Consumer Engagement Strategies

By Eliette Krakora, Clarissa Shen, and Heather Watt

To some, Barack Obama's presidential campaign slogan "Yes, We Can", reflected nothing more than a *change message from a change candidate*.

But in fact, it signified a change in how to structure a **presidential "marketing strategy"** - and it was a literal representation of how he expected to win. Not only did it imply a fight urging change in a time that demanded it, but it was a process message as well: this would not be a command-and-control campaign, but one reliant on a bottom-up strategy and supported by a top-down structure. By activating a new coalition of voters and engaging them in the process, he would motivate them to take ownership of the election.

Obama converted this activation into success at the polls by integrating both tried and true branding tactics with new and evolving marketing channels. He recognized that the recent proliferation of voter touchpoints - interfaces for assembling his coalition and spreading his message - had created new and multi-faceted opportunities for citizen engagement.

As such, he built an integrated voter communication strategy that not only accepted, but capitalized on the fact that these touchpoints can

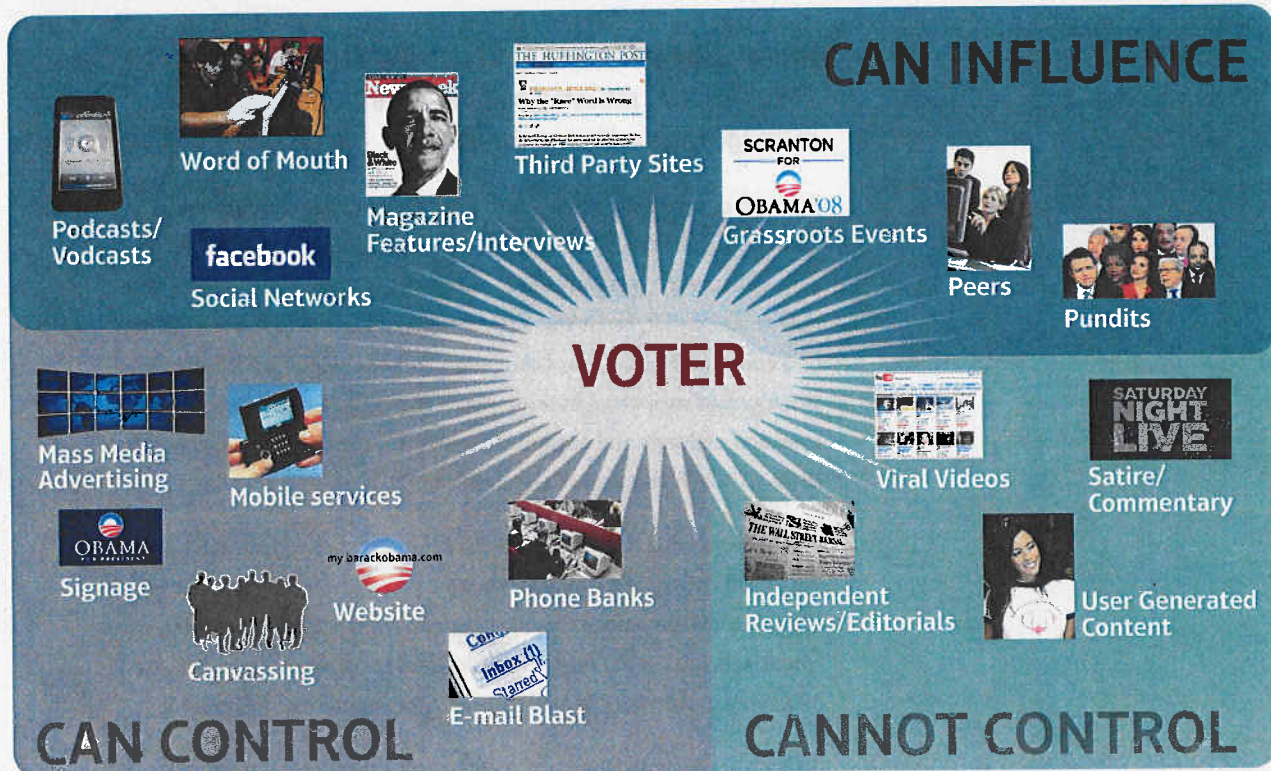
no longer all be controlled using traditional “push” marketing. He understood through which touchpoints messages could be controlled or influenced, and which could not be – and he configured his voter engagement strategy accordingly (Fig. 1).

His strategy enabled a conversation, both between himself and his constituents, but perhaps more importantly, among those constituents themselves. Chief among the drivers for success was his understanding of what to control and what to hand over to participants, balancing a top-down and bottom-up approach.

His strategy translated into literally billions of unique multi-channel interactions that all buzzed with the harmony of one very clear message. While his opponents pursued a number of these same channels as one-off, uncoordinated tactics, Obama was able to provide one clear and consistent, multi-channel approach that resonated across touchpoints to create the synergy necessary for success.

Above all, the Obama campaign teaches the lesson that **integrated engagement campaigns matter**. And that campaigns can now be activated more broadly than ever before. By highlighting key principles critical

FIGURE 1. EXAMPLES OF VOTER TOUCHPOINTS AND CHANNEL PROLIFERATION



to his success – principles that form the foundation of Monitor Group’s Precision Activation® and Channel Pathway® methodology – we can analyze how organizations may apply them in a broader marketing context to build deep and systematic engagement with their customers.

### Ground your campaign in a clear and consistent message

Despite the emerging complexities associated with marketing anything in today’s world, Barack Obama sold his distinct brand to Americans through an unchanging marketing tactic: he consistently repeated a clear message that was easy for his audience to understand. Whether he was asking for votes or soliciting donations, his audience was consistently reminded that it was time for “change to come to Washington,” “change they could believe in,” and change that was activated in direct proportion to their individual involvement.

Contrary to Hillary Clinton’s muddled communications – she famously deviated from a number of campaign slogans before landing on “ready for change, ready to lead,” – Barack Obama’s campaign was consistently able to “combine emotional with functional benefits and the discipline to be consistent in positioning,”<sup>1</sup> a core principle on which all successful branding campaigns are built. Obama had a story to tell, and each one of his communications, whether policy-driven or voter-facing, tied back to that story.

### Use a choiceful set of channels to get your message out, keeping in mind its intended purpose and audience

Barack Obama recognized that the recent proliferation of voter touchpoints had created new and complex opportunities for engagement, and developed a strategy that capitalized on each channel’s unique potential, while maintaining an overall integrated approach to each communication. **He chose and aligned each touchpoint and channel to create consistent and complementary experiences and messages.**

The campaign’s central website was just one channel among many, but it was highly functional and relatively low-cost. The Obama team was able to yield more than \$500 million in donations, 92% of which were less than \$100,<sup>2</sup> by building a central online environment in which people felt invested and felt compelled to re-visit. The site, consistent with the “Yes, We Can” message, was ostensibly about the user and not the candidate, fostering a space that users could feel a part of.

But apart from the functionality of Obama’s home page, the premium the team’s strategy placed on “the network” was also a key driver to its success. It was not enough anymore to have a one-way conversation with voters. The team therefore focused both outwardly, in places where the masses had already assembled (e.g. Facebook.com and Myspace.com), and inwardly, amassing a platform all its own. And depending

<sup>1</sup> The Marketing of a President, Harvard Business Review, November 12, 2008

<sup>2</sup> Obama Raised Half a Billion Online, Washingtonpost.com, November 20, 2008

on which audience he was speaking with, he was able to tailor a specific message.

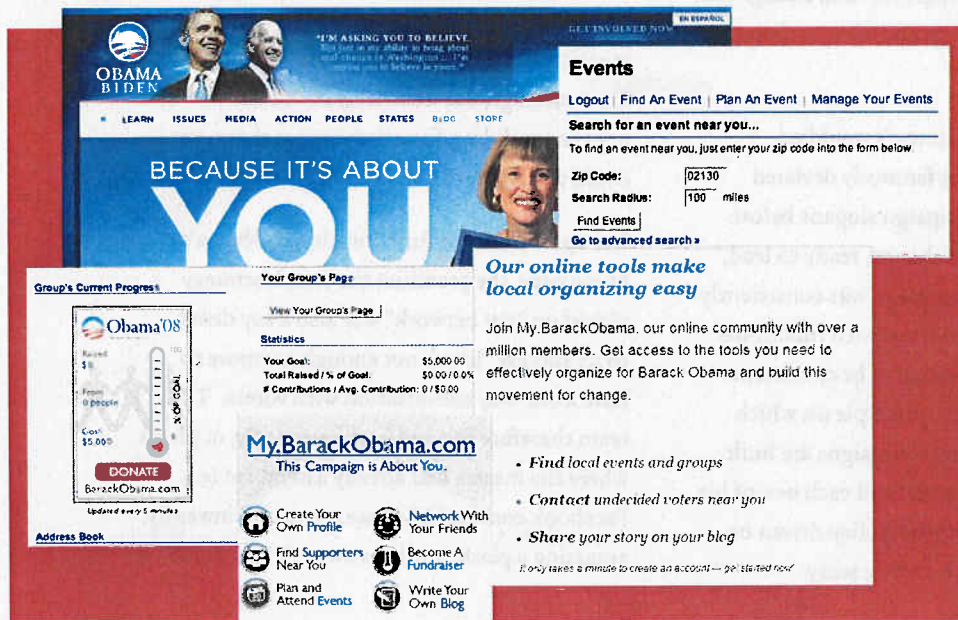
Obama's proprietary networking site, MyBO.com, allowed the Obama campaign to effectively incite citizens to act: it converted online energy into real, actionable tasks that took place outside the virtual world. The site offered multiple tools that translated to 200,000 offline events, 35,000 volunteer groups and over 3 million phone calls<sup>3</sup> - all non-virtual activities that could not have been coordinated through a traditional piecemeal network (Fig. 2).

In addition, one million people subscribed to Obama's text messaging program, immediately providing the campaign with an ability to target messaging with increased precision.

His database was organized by state, region, zip code, college campus, and specific type of message each supporter had indicated an interest in receiving - a significant **asymmetric information** advantage compared to data his competitors had at their disposal. And to maximize the effectiveness of the program, each short message the campaign sent contained an **actionable** piece of information for supporters: leading up to each major policy announcement, Obama's team sent a message to subscribers urging them to watch him speak that evening on CNN; on Election Day, supporters in battleground states received up to three text messages asking for **specific** help.

The team was also able to create significant momentum around the announcement of the

FIGURE 2. VARIOUS MYBO.COM TOOLS FOR LOCAL ORGANIZING



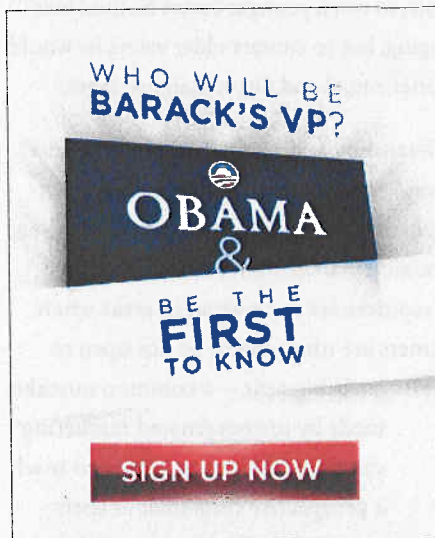
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<sup>3</sup> Obama Raised Half a Billion Online, Washingtonpost.com, November 20, 2008

democratic Vice-Presidential running mate by guaranteeing that anyone who signed up would be the first to hear Obama's selection – a tactic to specifically engage supporters in the process (Fig. 3).

**FIGURE 3. ADVERTISEMENT FOR THE OBAMA TEXT-MESSAGING PROGRAM**



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And each of these tactics became exponentially more valuable as time progressed, as the team understood the advantage that viral message dispersion gave to each communication. Text-messages and e-mails were easily forwarded to friends and neighbors; YouTube videos such as the Will.I.Am's "Yes, We Can" tribute became one of the most-viewed clips on the site during the campaign.

Finally, he utilized traditional media channels to disseminate his message, but in new and different ways. For example, by purchasing air time on five major television networks, Obama was able to tell a 30-minute story to millions of Americans simultaneously – a story that of course, resonated with the story he had been telling in pieces all along.

To be clear, John McCain's campaign marketing failure – as distinct from his message and brand which were compelling to certain voters – was not his ignorance of the voter touchpoints available for his use, but rather his failure to use each channel for its most effective purpose as part of an integrated engagement strategy. What resulted was an uncoordinated strategy that failed to achieve synergy across platforms. Where Obama's team "leap-frogged the mainstream media by producing content that they knew would get distributed for them once it was uploaded," the viral distribution of McCain content was seriously limited by their failure to foster an effective online community in the first place, thus lacking a distribution vehicle for the content they developed.<sup>4</sup>

And this is a mistake that is easily made when a marketing strategy does not include an evaluation of the different steps of consumer engagement. Every relationship is managed through a variety of touchpoints: improving the customer experience requires focused effort at critical touchpoints in a sequence that makes sense.

<sup>4</sup> How Obama Won it With the Web, FastCompany.com, November 4, 2008

**Precisely engage your customers with the right message, at the right time, through the right channel**

Despite the many channels Barack Obama activated that are described above, he did not send a first-time site visitor an invitation to build a profile on MyBO.com, nor did he contact undecided voters to rally support. Rather, he engaged those prospective voters through more effective touchpoints that built message awareness and preference, such as viral YouTube videos, campaign commercials, or advertisements on specific websites. There was a clear understanding of which touchpoints prospective voters preferred and how they absorbed information. Only when prospective voters tuned-in and opened up to his messages

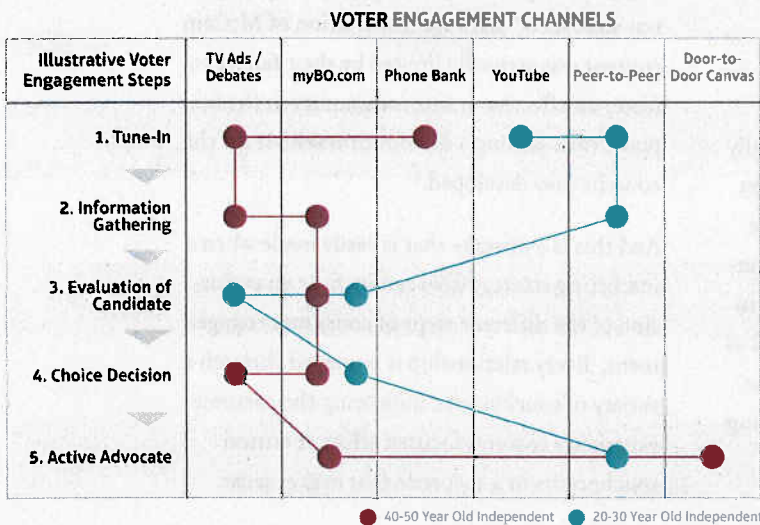
would they be engaged in the next stage aimed at motivating them to take actions when they were ready.

He was precise in targeting and segmenting voters such that the right messages and the right tools found the right individuals, at the right time, through the right channel. For example, to reach younger voters he used text-messaging, but to contact older voters he would send brief e-mail and direct mail messages.<sup>5</sup>

Understanding and optimizing the Channel Pathway® system ensures maximum impact of marketing activities while at the same time maximizing marketing ROI. This ensures that resources are not wasted in areas where consumers are unreachable or not open to the messages being sent – a common mistake

made by uncoordinated marketing campaigns. Whether trying to reach a prospective consumer at their origination, choice, or retention stage, each channel serves a specific purpose and the overall customer experience should be managed as a “system.” Figure 4 illustrates how different voter segments were targeted by the Obama campaign through different touchpoints at different stages of their voting and advocacy decision process.

**FIGURE 4.**  
**ILLUSTRATIVE EXAMPLE OF CHANNEL PATHWAYS® FOR DIFFERENT VOTER SEGMENTS**



<sup>5</sup> How Obama Won It With the Web, FastCompany.com, November 4, 2008

### Take a dynamic approach and systematically adapt spend over time

As marketing channels have proliferated in numbers and evolved in purpose, it has never been more important to allocate marketing budgets effectively across platforms. This process can be optimized by consistently re-evaluating activities and spending based on timely feedback of each channel's efficacy in driving desired voter / customer behaviors.

The Obama strategy successfully capitalized on this principle, executed in multiple ways. For example, the campaign assigned a team of analysts to strategically place advertisements on targeted websites, constantly monitoring which ones were most successful at driving traffic to his proprietary sites - providing an instant measure of audience penetration. This data was processed to refine the campaign's understanding of user-behavior and fine-tune the marketing mix across channels.

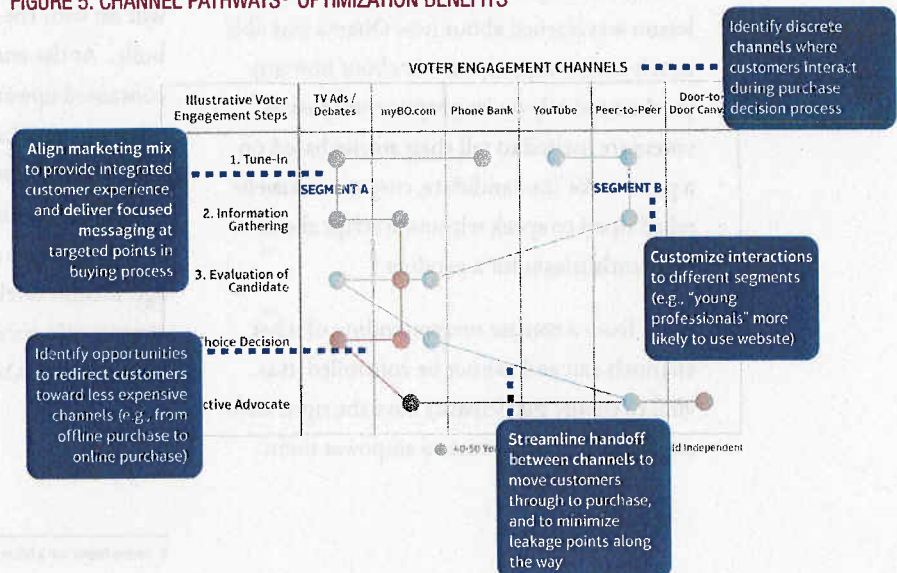
Tracking and measuring where to invest at what time is extremely important for any campaign, political or otherwise. For the Obama campaign, this was especially important to manage the disparate citizen energy at the grassroots level such that individuals could be directed to achieve coordinated impact.

In the consumer market, it allows marketers to re-direct consumers to more cost-effective pathways. Understanding the routes customers take throughout their buying experience allows an optimized handoff, between different stages and between different channels, to minimize drop-off and customize interactions for different target segments (Fig. 5).

### Know when to relinquish some control: a bottom-up strategy structured from top-down

Traditional "push" marketing methodology dictates that campaigns are most effectively driven from a top-down, one-way conversation through tightly-controlled messaging. The Obama campaign, however, assessed whether there was a way to relinquish some of that control in order to capture a greater return despite the risk. What resulted was a balance between the two approaches. The strategy

FIGURE 5. CHANNEL PATHWAYS® OPTIMIZATION BENEFITS



employed by the campaign sought to maximize the amount of control they could realistically retain while minimizing the optics of that control to the outside world.

When Ron Paul famously relinquished all control of his campaign to the grassroots in 2004, it resulted in wasted citizen energy and a series of actions lacking goals (a corollary to not understanding the need to measure results and where to invest and re-invest). The Obama strategy, however, was driven from the bottom-up but structured from the top-down, meeting in a middle-ground where foot soldiers felt anything but commanded.

That philosophy at work ensured that his campaign was volunteer-centric. What organizers realized was that the risk of personal story-telling by volunteers, and going “off message” far underweighted the reward that came from a more poignant, more authentic, human engagement.

Though the experiment was risky, a valuable lesson was learned about how Obama was able to rely on his supporters – or about how any product can rely on its proponents. Just as voters are incited to tell their stories based on a passion for the candidate, customers may be relied upon to speak without a script about their enthusiasm for a product.

Aside from a concise understanding of what channels can and cannot be controlled, it is vital to ensure participants have the right advocacy tools and platforms to empower them

and to give them a sense of ownership over the story-telling process (choice in messaging). Through this strategy consumers can become highly engaged and willing to disseminate a (low-cost) message all on their own.

This level of engagement has the added benefit for campaign-owners of integrating themselves directly into a feedback dialogue that has, until recently, only existed among consumers out of sight of campaign management. Additionally, by offering a platform where consumers can assemble, they also become accessible. It is then possible to provide consumers with appropriate product information to drive an informed dialogue, which affords a level of influence over that conversation.

### Create a living model – establish relationships and communities, not just interactions

As the country awaits Barack Obama’s inauguration, techno-enthusiasts wait to see what he will do with the extraordinary network he has built. At the end of the election, his e-mail list contained upward of 13 million addresses – addresses to which his aides were able to send 7000 **different** messages during the campaign.<sup>6</sup> In the process, he also collected unprecedented levels of data on American voters. Details like age, income level, education, all the way to pop singer preferences and favorite movies all have a home on MyBO.com – which is still functional

<sup>6</sup> Obama Raised Half a Billion Online, Washingtonpost.com, November 20, 2008



despite the election's end. And he continues to augment the level of information he has about his base: for instance, he recently sent a questionnaire to all MyBO.com members, letting them vote on their policy priorities, and asking them to indicate the level of future support they expect to contribute. These responses were then rolled into his "Organizing for America" movement on the eve of his presidency.

While other campaigns failed to consistently update their blogs and communications, BarackObama.com was updated constantly, more than Oprah.com<sup>7</sup>, a tactic that kept his supporters engaged in the process over an extended period of time. While other campaigns let their relationships with voters stagnate by not committing to consistently utilize certain channels, Obama has seamlessly transferred his audience to his new home platform, Change.gov, continuing his voter engagement strategy as a foundation for his presidency.

And he continues to grow and deepen these relationships by seamlessly integrating the platforms he worked to enable throughout the past two years. For example, supporters recently received an e-mail message from Michelle Obama calling on Americans to join her family in a "day of service" to rejuvenate America. Those who received the message

were then prompted to watch a video detailing various events – and finally, were asked to either organize or participate in a grassroots event in their community (Fig. 6).

What Obama has achieved is the ideal goal of relationship marketing: building relationships and communities that evolve over time and thus stay relevant.

### "Yes, We Can"

Though the complexities that exist in today's marketing world may seem overwhelming, what the Obama strategy illustrates is that a clear and systematic approach to "customer engagement" affords a significant opportunity to gain a truly competitive advantage. What would otherwise seem a chaotic tangle of choices around which customer segments to target, with what messages, through which channels at what time, becomes a cohesive campaign.

FIGURE 6. EXAMPLE OF CONTINUED RELATIONSHIP MAINTENANCE OVER TIME



<sup>7</sup> The Brand Called Obama, FastCompany.com, March 19, 2008

Though many pundits are describing his voter engagement strategy as “revolutionary” – and they are right in the sense that his campaign capitalized on previously non-existent and evolving marketing channels – what Barack Obama really achieved is a successful integration and optimization of some key principles for voter engagement:

- He grounded his campaign in a clear and consistent message
- He used a choiceful set of channels to get his message out, keeping in mind its intended purpose and audience
- He engaged his audience with the right message, at the right time, through the right channel
- He took a dynamic approach and systematically adapted spend over time
- He knew when to relinquish some control by having a bottom-up strategy structured from the top-down
- He created a living model that looked at establishing relationships and communities and did not focus on one interaction or transaction

These principles hold true and can create a competitive advantage whether we are looking at engaging voters or engaging consumers and customers. They build on asymmetric information about voters/consumers/customers – what information they seek, their behavior and motivation to take action, and their propensity to act as an advocate for an idea, a candidate, or a product – to build an integrated communication architecture that drives deeper and more relevant engagement than the competition. •

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