



Blueprints for Change: 'HOW-TO' TEXTING CAMPAIGNS

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Disclaimer / request for your help

This is a work in progress that is meant to evolve over time with input from campaigners. At the moment, the tips and ideas here reflect the voices of the [contributors/reviewers listed below](#). We are always looking to add more voices of campaigners that have knowledge and experience on this topic. If this is you, please contact us here: blueprintsfc@gmail.com.

Summary

Peer to peer texting is a method for contacting your base via text messages to deliver calls to action. Usually done at high volumes, it requires a P2P texting platform and a group of staff or volunteers to deploy the campaign. (True person to person texting, ie. texting one's own contacts using your personal device as part of a campaign, would fall under the heading "phone/text banking" and will be treated in a separate how-to).

Who's doing it?

During the Bernie Sanders primary race, the Text for Bernie program sent 8 million messages to rally support for the candidate, almost all of which were sent by volunteers using P2P texting apps. Also using P2P texting are [Vote.org](#), [Color Of Change PAC](#), [Movimiento Cosecha](#), [ACLU](#), [Working Families Party](#), [Greenpeace](#) and many more.

Case studies

ACLU's People Power Launch

The American Civil Liberties Union's [People Power program](#) kicked off in March 2017 with a "Resistance Town Hall" in Miami, Florida, featuring allies, celebrities, and ACLU leaders. The Town Hall was live-streamed to thousands of watch parties around the



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country. In order to recruit hosts and attendees to the parties, the organization relied heavily on peer-to-peer texting (P2P) via Relay.

The ACLU began by recruiting a large group of volunteers to serve as texters, convening them in a Slack for training and rapid communication. Next the volunteer teams sent text messages (as well as email blasts) inviting ACLU members to host events. Once hosts were established, the ACLU then texted any supporter within 15-20 miles of an event, inviting them to attend.

Results:

108867 people texted
35% response rate
22% agreed to attend
2200 parties held nationwide

Movimiento Cosecha

In the face of escalating attacks on immigrant communities, [Movimiento Cosecha](#) has assembled a diverse, decentralized, and powerful network of organizers and activists fighting back in 20 states.

Cosecha first experimented with peer-to-peer texting (P2P) in February 2017, following Trump's inauguration. They wanted to reach new people and recruit them to come to Boston for a three-day migrant resistance training, but they were having a difficult time getting responses via email. So they decided to try [Relay](#), a P2P texting platform. Their texts garnered a 23 percent response rate, and ultimately they surpassed their original goal for participation. The event drew more than 350 people, and helped launch the "Day Without Immigrants" protest in May.

Results:

2979 supporters texted
42% response rate
350 agree to attend



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Impact/ Why do this?

Higher open and response rates

Text messages are recorded as having a much higher open rate than emails (more than 80 percent estimated) and recipients don't have to opt-in.

Text messages also have a much higher average response rate of ~20%.

Communications with a personal touch

One of the reasons P2P texting is so effective is because it mimics how people already use texting--for talking to friends and family. P2P texts come from a local cell phone number and contain personalized information about the recipient and sender. Because recipients feel like they are talking to a real person (which they are!), they're more likely to read, ask questions, and take action.

Reaches new audiences

Groups organizing immigrant communities for advocacy, like Movimiento Cosecha, point out the fact that texting is a much more natural and engaging channel for their community versus web platform-based communications.

Engages new supporter segments

According to ACLU People Power campaign organizer Nicole Fairall, engaging supporters in P2P texting campaigns allows groups to activate volunteers who might otherwise not be able to participate in events or other activities. People who have disabilities, lack transportation, or live in rural areas, can use the P2P platform to participate in the advocacy effort from their homes.

Can be fun as group work

Less demanding than phone-banking, P2P texting leaves time for supporters to chat together while reaching out and several groups have organized 'textathon' parties with music and drinks to make it all more fun for those involved.

Can be used to drive different actions



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While P2P texting lends itself well to political campaigns, especially get out the vote (GOTV) drives, it is also effective when driving people to participate in demos, events and trainings.

TCPA Compliant (for the U.S.)

Your volunteers are manually hitting the send button for every text, with texts going out from a ten digit number. This ensures TCPA (Telephone Consumer Protection Act) compliance, letting you legally text anyone you have a number for whether they've opted in or not. All things considered, your campaign will receive better response rates and engagement from people who've opted in to receive texts. But for campaigns like GOTV efforts where you're texting people off the voter list, peer to peer texting is your biggest ally.

Natural Data Collection

Data on voters and supporters are collected as part of personal conversations rather than passive surveys. This prompts more people to share information, with details about who agreed to attend an event, how a voter feels about a candidate, or pledges to donate, recorded then and there on on-screen forms by volunteers.

When this might not work for you

If your campaigning structure is not set up to recruit, train and oversee large numbers of supporters to run a texting drive (ie. you don't have an existing supporter-organizing game), then you will find it next to impossible to set up a P2P texting operation.

P2P texting campaigns are designed to drive people to take some kind of simple next step such as signing up to attend an action, committing to contact their representative or showing up to vote. If your campaign has no clearly defined next step or opt-in destination, then P2P texting efforts may be wasted.

P2P texting is not free or very low-cost. At scale, P2P texting can be expensive because pricing is based on amount of numbers contacted. While individual messages may just cost pennies, this adds up to hundreds or thousands of dollars in fixed costs as campaigns get successful. And even though most campaigns can be run by volunteers, considerable staff time does need to be put aside to oversee the operation.



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What this requires (people, resources, etc.)

Action plan

All good P2P texting campaigns start with a clear idea of the simple immediate outcomes that you are driving your base towards. In other words, what are you trying to get people to do? Typically, this involves attending an event or demo, showing up or registering to vote or signing up to participate in some kind of mass action, online or offline.

People power

You will need a group of supporters that are willing to roll up their sleeves and join in the P2P texting effort. This is usually a commitment of several hours over a couple of weeks.

Database

You will need good lists of your supporter mobile numbers, ideally broken down by region and exportable in spreadsheet format (Excel, CSV etc.).

Platforms

P2P texting campaigns are managed and run through proprietary software platforms such as [Relay](#), [CallHub](#) or [Hustle](#).

Staff and financial resources

Overseeing an active P2P texting campaign will require the full-time attention of 1-2 paid staffers.

P2P texting platforms will determine pricing based on volume of contacts or the amount of messages sent. The service costs typically run at 8 cents (USD) per message or 22



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cents per contact (USD) but can climb into hundreds of dollars per month when texting volumes run into the thousands.

Setup steps/ stages

Setting up the P2P texting platform and sendouts

Activate and configure an account with a P2P texting platform such as Relay or Hustle and then do the following:

1. Write the script for the initial messages and replies for approval (review process can start while everything else is getting set up)
2. Pull your contact list from your database (CRM, csv file or other). Upload into the P2P texting software platform (Relay, CallHub, Hustle etc.) Here, you can also use software integrations to directly sync contact lists from your CRM into your texting tool.

Finding and onboarding your P2P Texting crew

To gather your volunteer texters, you will need to reach out to your base and recruit these “high-action takers” willing to spend some time learning this new skill and participating, either in a shared location or remotely, in the P2P texting effort.

P2P texting and the platforms it works through will be new for almost all of your volunteers and you want to make sure they know what they’re doing. Having well-trained volunteers will drastically cut down on the support you need to offer once they get started.

On Text for Bernie, Relay founder Daniel Souweine set up a self-service approach to training, which cut down on scheduling allowed texters to self-educate and opt-in from there.

Here are some sample tools for self-service training kits.



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- [Video](#)
- [Quiz](#)

If you are running a smaller operation for a shorter amount of time, you may want to do a series of live webconference trainings with batches of new recruits.

Managing volunteer teams

Most P2P texting campaigns start by signing their volunteers up to a [Slack](#) channel to ensure quick and steady communication for scheduling and other issues. [Trello](#) is another complementary system that can flag outstanding group tasks and works well with Slack.

Use comms channels such as Slack to dispatch urgent requests but also as open question and answer spaces. If the community on your channel is strong, volunteer texters can often answer each other's questions.

Also use these channels regularly to boost morale by reporting on specific milestones with stats and shout-outs to recognize the hard work that volunteers are putting in.

Scheduling volunteers

In order to have your volunteers send texts, you have to know when they are available. Best practice here involves creating "shifts" that are between 200 and 500 messages, and letting volunteers know that a "shift" takes place over the course of about 48 hours -- which is how long it takes for replies to come in and conversations to run their course. It's important to make clear that a shift is not complete once they send out their initial messages. The real work is in responding to replies and collecting data using survey questions.

It's also important to try and spread out assignments so that each new volunteer gets something to do so that they feel valued and needed.



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Some days fill up better than others and when Nicole at ACLU found it hard to fill up schedules, she would send a call for help through the groups Slack channel asking for more volunteer signups on that given day.

Tracking results

Throughout the campaign, check every evening to ensure all the assigned texts went out or are currently being sent. When running texting with [NextGen](#) and the Bernie campaign, Nicole Fairall reports that there were routinely a number of unsent texts that had to be cleaned up and finished by a sub-group of “all-star” volunteers who made sure everyone got replied to and that all responses are recorded.

Texting platforms integrate survey questions such as whether or not the recipient will attend an event you are promoting. It is important to track and compile response rates for such questions once a week to make sure that outreach is working well.

Platforms also allow the data from outreach, including positive responses to invitations, to be exported into other supporter management platforms such as Action Kit so that event and outreach management with your base can continue there.

Best practices + texting etiquette

Here are some principles for best-use of P2P texting thanks to the folks at Relay.

Use “peer senders.” People are more likely to engage with someone who they perceive to be “just like them.” If possible, use non-staff to send your messages. And if you do use peer senders, make sure your recipients know by saying so in the message.

Hi %FirstName%, this is %SenderFirstName% volunteering with Bartlett for President. We are having a big event in %City% on Saturday. Can you make it?

Start with a question. The best way to start a conversation is to ask a question. So, whenever possible, end your initial message with a question mark to spark a dialogue. For example:



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Hi %FirstName%, this is %SenderFirstName% from Bartlett for President. We are having a big event on Saturday. Can you make it?

Introduce yourself. A great way to personalize your text is to introduce yourself. We think it's best to identify yourself and your organization in the first sentence, like this:

Hi %FirstName%, this is %SenderFirstName% from Bartlett for President. We are having a big event on Saturday. Can you make it?

Leave something out (when optimizing for conversations). Another way to get conversations going is to leave out information from your initial text. For example, you might tell someone that there is an event in their town, but not the exact address. If they're interested in attending, they'll ask for more details! This tip may make less sense if you are optimizing for clicks or other forms of conversion.

Don't be too formal. Text messages are mostly used for communicating with friends and family, so are more likely to have a casual tone. Keep your messages easy going and conversational to match the medium.

Keep it brief. Similarly, you should avoid excessively long texts, especially for the initial message. Text messages are sent in blocks of 160 characters. So anything above 160 characters will split into two messages for most carriers. If you can keep your initial message to 160 characters, that's ideal. But if not, you should definitely strive to be below 320.

Avoid "textese." Since the rise of smartphones, people rarely use "textese" like "i will txt u l8r," so avoid unnecessary abbreviations, capitalize the first word of your sentences, and include standard punctuation.

Personalize your initial text Your first text should answer three questions most people ask themselves when they give a text the once over.

'Is it meant for me?' i.e. Are they just another name on a list, or, is this text meant specifically for them

'Who is this?' i.e. Do they know the person sending the text



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‘So what?’ Now that they’ve read the message, what is the next course of action

The questions are answered in three simple steps — personalize, identify, and prompt.

Personalize your message for each individual contact — “Hi %FirstName%”

Identify yourself and your organization — “this is %SenderFirstName% from Bartlett for President”

Prompt them with a call to action or a question — “Can you make it?”

And of course, a healthy dose of emojis helps ensure that the receivers treat the text like it’s from a real person and not an automated tool.

(There are instances when you’d want to strike a more authoritative tone rather than a friendly one. We recommend testing your texts to find the tone that your audience relates to.)

Decide on conversational vs informative texts: Peer to Peer messaging is built for personalized conversations. And most people take that to mean that if contacts are not replying in large numbers, they’ve fallen short on engagement. That’s far from the truth. Take two instances of outreach for an upcoming event.

The goal of the initial P2P text is to nurture the audience and to get them talking and interested in learning more about the event. So, an initial text that prompts a response makes sense here.

“Hey Jon, this is Melinda from Hope Society. We’re holding a rally next Saturday to support the Clean Energy Act 🙌. There’ll be snacks and drinks 🍕. Want to come?”

This text is meant to initiate a conversation. It instills curiosity about the event prompting follow-ups about where it’s going to be held, what time it’s going to held, if there’s going to be transportation facilities and so forth.

Next comes the follow-up reminder for everyone who agreed to attend.

“Reminder for Clean Energy rally tomorrow at 221B Baker St, Marylebone from 3pm to 6pm. See you there!”



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The text is meant to be informative, not conversational. A horde of incoming replies to this reminder is a waste of your staff time.

Although people will still reply to this text enquiring about one thing or another, the response rate will be far lower owing to its informative nature unlike the conversational nature of the previous text.

This is just one example to drive home the point that you have to reflect on your goal and then decide on making the distinction between informative and conversational text messages

Make sure your links are short and clickable. When adding links to your initial message or your recommended replies, use a URL shortener like bit.ly whenever possible. Also make sure your links begin with http:// so that all phones will interpret them as clickable links. Finally, check your message length (considering variable contact/sender name length) to ensure that no URLs get cut in half between 160 character message segments.

Schedule strategically. The overall “arc” of a texting campaign is usually 24-48 hours. That’s how long it will take for all of the responses to come in and all of the conversations to be completed. So make sure that your senders are prepared to continue answering questions and recording data intermittently during that time window.

Opt-out gracefully. It’s inevitable: some people won’t want you to text them. When you receive an opt-out request (“stop”, “unsubscribe”, “remove me from your list”, etc.) it’s important to honor the request promptly and courteously. After you press the “opt-out” button you’ll have the opportunity to send them a pre-loaded confirmation message that you’re welcome to modify.

Tricky parts/ fixes

Overwhelming volunteer response



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Nicole Fairall reports that when asked to join P2P texting activities, very large numbers of volunteers immediately answered the call-outs in the campaigns she ran.

Due to the volume, her teams had to make onboarding and training processes as streamlined and self-serve as possible as one-to-one sessions with new recruits would have been impossible.

In response, they created an onboarding email including all the basic steps to get started and used a starter video provided by Relay, which gave new recruits a visual intro to the functions on the texting platform. They also sign people up to slack and provided them brief google doc with FAQs and login information to help them get active on the P2P texting platform.

Texting fatigue

As P2P texting gains in popularity and people find themselves targeted by multiple campaigns, some pushback has been recorded and people in the campaigning space have talked about the rise of 'texting fatigue' if the practice is overdone or misused.

Generally, pushback comes from people being over-solicited by P2P texting campaigns or not having their questions answered once they have been reached out to by texters,

In response, experienced texting campaigners suggest not reaching out to people more than 1x a week.

When someone requests to be taken off your lists, in whatever way they choose to say it, you should process their opt-out to make sure they don't get left on the list. They also recommend letting people know you are opting them out so they have confirmation that their request has been heard.

Also, if people on your lists have not responded after 3 or 4 waves of outreach then they should be removed.

Relay offers the following additional text etiquette rules to make sure people continue responding well to P2P texting campaigns:



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- **Introduce Yourself** — In most P2P texting programs, the texter will not personally know their recipients. Which is why we highly recommend scripts that introduce the sender and the organization they are texting for. Messages without that information won't just be annoying, they'll likely be confusing and ineffective too
- **Answer Every Question** — P2P texting is about having conversations, which is why we tell every client, if you're not prepared to answer questions, you shouldn't be texting people in the first place. We know that some P2P texting programs are organized to simply send outgoing messages and ignore any replies. To those programs we say emphatically: you are doing it wrong!
- **Respond Quickly** — While texting is not instant message, it's also not email. When people send you a text they expect a speedy response, and it's in your interest to meet that expectation. The faster you respond, the greater chance the person is still available to finish the conversation and (hopefully) say yes to whatever you are asking them to do. You should answer questions as soon as possible — ideally within the hour. If you can't get right back to someone, we recommend a maximum of four hours delay.

Further resources

P2P texting webinar featuring Thais Marquez from Movimiento Cosecha

<https://powerlabs.io/text-messaging-for-organizers/>

Social Movement Technologies' online course

<https://courses.socialmovementtechnologies.org/p/text-messaging-for-organizing>

Civicist articles on P2P texting

<https://civichall.org/civicist/revolution-text-me/>

<https://civichall.org/civicist/texts-for-bernie-lives-on-in-issue-driven-campaigning/>

Texting best practices by Relay on Medium

https://medium.com/@daniel_37850/how-to-not-ruin-texting-in-2018-9bf398caaa8a

Texting guides and best practices from CallHub



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<https://callhub.io/13-best-practices-you-must-follow-for-peer-to-peer-texting/>
<https://callhub.io/collective-texting/guides/>

Who can help with this?

Consultants, trainers:

[PowerLabs](#)

[Social Movement Technologies](#) (email them directly to inquire)

Platform providers:

[Relay](#)

[Hustle](#)

[CallHub](#)

Attribution

Input and resources for this draft were provided by:

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