



MESSAGING  
FOR ACTION

HOW CIVIC CHANGEMAKERS  
DRIVE MASSIVE ENGAGEMENT

*Every second, Twilio powers 15 connections from people around the world to their elected officials, totaling more than 300 million in 2017 alone.*

These connections span communication channels like video, voice, and even fax, but the vast majority are sent from mobile messaging apps like SMS and chat.

The ubiquity of these messaging apps allows organizations to engage people in the democratic process at incredible scale. But scale alone doesn't drive positive change. Organizations can use mobile messaging to create productive dialogue between elected officials and their constituents, so constituents can make a difference when it's needed most.

In this guide, we'll take a closer look at when, why, and how to use messaging to engage your constituents. Based on conversations with experts in advocacy and civic engagement, we recommend how to create great content, design a message flow that moves people to action, and integrate mobile messaging within your overall communications strategy.

With the right mobile messaging strategy, you can help strengthen your democracy and drive positive change. Are you ready?

## CONTENTS

- Page 3** About this guide
- Page 4** Best practices: content
- Page 8** Best practices: flow
- Page 11** Best practices: strategy
- Page 14** About the contributing organizations
- Page 16** About the author

## MESSAGING IN ACTION

### FIGHT FOR THE FUTURE

OVER  
**1.25**  
MILLION

calls to Congress

### DEMOCRACY WORKS

**1**  
MILLION

TurboVote users during  
2016 election

### PURPOSE

**15%**

of users click through messages  
in the first two minutes

### DOSOMETHING.ORG

OVER  
**3.6**  
MILLION

mobile subscribers for text  
activation campaigns

## ABOUT THIS GUIDE

We believe change grows through sustained relationships between advocacy organizations and constituents, and between constituents and their elected representatives. Alongside traditional tactics like high-volume calling campaigns and one-on-one conversations, messaging apps can play a valuable role by connecting people to the democratic process. We hope the insights from our conversations with leading civic engagement organizations help you strengthen your community for the long game.

*“Talk to people and use tech as the medium for human-to-human conversation, which is still the biggest changemaker there is.”*

—KATHRYN PETERS,  
DEMOCRACY WORKS

## ABOUT TWILIO.ORG

Twilio.org is the social impact arm of Twilio, the leading platform for voice, SMS, and video communications. We connect social impact organizations, passionate software developers, and the full power of the Twilio platform to ignite positive change on a local to global scale.

Twilio.org supports nonprofits and social enterprises with credits and discounts through the Impact Access Program, volunteer developer support through the Impact Corps, and grants and investments through the Impact Fund. [Visit us online](#) to see how we can help you reach your communications goals.

## THE EXPERTS

In 2018, we asked 12 experts to share their mobile messaging best practices, cultivated through years of practical experience. Thank you to these changemakers whose time and expertise make us better communicators:

### **Freddie Bologna**

Director of Mobile Messaging, DoSomething.org

### **Chazz Clevinger**

CEO, One Click Politics

### **Adam Daigian**

Director of Growth, Hustle

### **Drew Daniels**

Senior Manager of Online Strategy, Human Rights Campaign

### **Evan Greer**

Deputy Director, Fight for the Future

### **Josh Hendler**

CTO, Purpose

### **Seamus Kraft**

Executive Director, OpenGov Foundation

### **Cayden Mak**

Executive Director, 18 Million Rising

### **Kathryn Peters**

Co-founder and CEO, Democracy Works

### **Katie Reilly**

Senior National Online Organizer, Sierra Club

### **Daniel Souweine**

CEO and Founder, Relay

### **Maria Yuan**

Founder and CEO, IssueVoter

# CONTENT

A great message grabs people’s attention and motivates a response, using language and style that fit the communication channel. Use these tips to write effective, engaging messages to your audience.

## BE AUTHENTIC

Most people associate SMS and chat with friends and family, a major reason messaging has a high read rate. Respect the personal nature of messaging by speaking to people with the same frankness that you would close acquaintances. A familiar voice can make people feel comfortable, unlike overly formal or transactional messages.

*“If you look at the text messages on your phone, it’s all conversations with friends and family—people you know. If you’re going to get a text message from someone you don’t know, the conversation should feel as familiar as possible.”*



DANIEL SOUWEINE,  
RELAY

*“The language of advocacy can be a bit formal, but you can soften it by talking to people over SMS like your friend.”*



JOSH HENDLER,  
PURPOSE

Hey Katerine! Thanks for coming by last night. What was your favorite moment?

I met some really cool people! But think the best part was when the girl with the hat took the mic. She had me in stitches!

Haha that was me! 😊

No way! So funny 😂

Credit: Hustle

## USE CONSISTENCY, NOT A SCRIPT

When multiple people at your organization message with constituents, give them the freedom to be authentic and true to themselves. Be consistent, not contrived. Overly scripted messages can fall flat.

*“We encourage people to be straightforward and use the appropriate tone for their organizations. When you’re putting people in a position to communicate on your behalf, you have to let them talk the way they would normally talk. They’re people, not robots.”*



DANIEL SOUWEINE,  
RELAY

*“Be human. Having a personalized touch is an easy way to set your SMS message apart from the other messages folks are receiving daily.”*



DREW DANIELS,  
HUMAN RIGHTS  
CAMPAIGN

*“I often describe our voice as something that our team co-creates. More than just providing guidance about how to interact, I ask new member-facing teammates about how they like to communicate with organizations online, and describe the kinds of details that make them feel seen and heard. Then, I ask them to describe our organization’s voice in their own words. This helps them think through how to make choices with every interaction that fit our mission and values while giving them the latitude to both define it and help it evolve.”*



CAYDEN MAK,  
18 MILLION RISING

## ASK A QUESTION

If your goal is to drive audience response, don't just send outbound alerts and notifications. Turn your messages into a conversation by asking a question. Questions move the conversation forward and nudge people toward action.

*"We don't want people to just send lots of messages, we want customers to spark relationships. And the only real way to do that is to have a conversation. So we recommend that with messages, there's conversational tone and a question that engages."*



ADAM DAIGIAN,  
HUSTLE

Hey Elijah! There are important local elections in St. Louis next Tuesday, November 7. You can drop off your ballot until 7pm. Have you voted yet?

Not yet...how do I find my polling station?

I got you!  
Go to <https://www.usa.gov/election-day> to find your polling location.

## PERSONALIZE IT

Include personally relevant details like your name and the recipient's past engagement with your organization. You want to draw people into a conversation, not talk at them. Put your messages through a filter. Would this message motivate you to engage?

*"Every text message that goes out comes from me—'Hey, it's Freddie'—to create authenticity and a personal relationship."*



FREDDIE BOLOGNO,  
DOSOMETHING.ORG

*"If you don't include your name, it'll look like a notification or blast message. The recipient won't necessarily realize that you're starting a conversation, and not just sending an outbound message."*



ADAM DAIGIAN,  
HUSTLE

Hi! This is Freddie from DoSomething.org! I text about cool ways to take action in your community, AND scholarship opportunities. Go to [DoSomething.org](https://www.dosomething.org) to see!

Credit: DoSomething.org

## KEEP IT TOPICAL

From pending legislation to breaking stories, tying messages to current events can spark immediate action—especially if the event touches people directly. Plan campaigns to coincide with major events like elections, and be nimble enough to respond quickly when important news breaks.

*“We’ve found that back-to-school is a really valuable moment for voter registration, because a lot of people have changed their address. It’s a new start for them. People are often better at forming new habits when they’re making other changes.”*



**KATHRYN PETERS,  
DEMOCRACY  
WORKS**

*“When we combine a really short message with a reference to the zeitgeist of the day, those texts do really well.”*



**JOSH HENDLER,  
PURPOSE**

**Happy International Women’s Day! Tell a woman in your life how kickass she is...and then continue doing that every day.**

Credit: Purpose

## STAY HONEST AND SUBSTANTIVE

Establish yourself as a source of value by offering accurate, honest information in your messages. If you’re sending news alerts or activating people around an issue, make sure the information you provide is useful and reliable.

*“We make sure we can back up every single thing we say, and that it’s meaningfully substantive. Every communication we put out furthers our audience’s understanding of an issue rather than just creating noise. This is important because you are building smarter activists over time.”*



**EVAN GREER,  
FIGHT FOR THE  
FUTURE**

*“Make it a priority in your messages to provide enough information within 160 characters. This is a must, and it’s one small way to build credibility and trust.”*



**DREW DANIELS,  
HUMAN RIGHTS  
CAMPAIGN**

## BE CONCISE

Messaging thrives on brevity. Use concise messages so your audience can quickly read and reply, increasing productive engagement. If your message absolutely requires more text, link to additional content on the web. Also try using an emoji to distill your message and add personality.

Thanks for your donation, Jeremiah! Your gift powered 100 calls to Congress during our March campaign.



*“All of our text messages are very short. They’re never more than three or four words. Regardless of how many times we’ve tested it, the golden rule of ‘shorter is better’ always applies.”*



**JOSH HENDLER,**  
PURPOSE

*“We know emojis, when properly used, can help. We know that shorter is better, because that’s the language of text messaging.”*



**DANIEL SOUWEINE,**  
RELAY



# FLOW

The immediacy of messaging provides a rare opportunity to turn moments in civic life into movements for social change. To capture these moments, you need a message flow that moves people to action. Use these tips to create a custom framework that engages and motivates your audience.

## CREATE A USER-DRIVEN EXPERIENCE

Your audience likely includes everyone from newbies to veteran advocates. While some people might feel comfortable hopping on the phone to speak with their elected representative, others may need guidance on what to say, or prefer sending a letter. Guide people to resources and actions that match their readiness to engage, and provide off-ramps when appropriate.

*“Technology is changing, but people still crave easy experiences. It’s all about creating positive interactions with your audience every time they hear from you—even through SMS.”*



**DREW DANIELS,**  
HUMAN RIGHTS  
CAMPAIGN

*“Calling an elected official can feel intimidating. Make it easy by using an audio recording or online landing page to provide talking points and a quick overview of what to expect. Follow up with a text to ask how it went and get any feedback from your users.”*



**KATIE REILLY, SENIOR  
NATIONAL ONLINE  
ORGANIZER,  
SIERRA CLUB**

*“Those of us in voter engagement tend to think the entry point is voter registration. But the Center for Civic Design found that’s not how voters organically engage. People come in knowing that an election is happening and want to know what’s at stake. ‘Who’s running? What are the choices? My friend said this is going to be important and I really want to have a say.’ That’s their invitation to engage.”*



**KATHRYN PETERS,**  
DEMOCRACY  
WORKS

## PLAN FOR SCALE

We’ve seen mobile messaging campaigns grow rapidly from a few thousand participants to tens of millions. Plan for scale from the outset. The immediacy of messaging enables you to reach people fast, but that also means recipients will expect a reply in short order. Use chatbots to automate these replies when possible. If you have staff members responding to messages—such as during peer-to-peer messaging campaigns—be prepared to handle the volume of responses you receive.

*“If you’re not prepared to answer all the questions that come in, don’t send out the message in the first place. If you are inviting people to an event, they’re going to have questions. ‘Can I bring kids? What if I show up late? Where is parking?’”*



**DANIEL SOUWEINE,**  
RELAY

## REDUCE THE FRICTION

With mobile messaging, you can simplify and automate actions that otherwise require additional effort from your constituents. Use click-to-call links and chatbots to route a person’s message to the appropriate representative, so constituents can focus on making an impact, not navigating a congressional directory.

*“As advocates, we know how to motivate people to do one thing, so we make sure that that one thing is the most impactful thing they can do.”*



**EVAN GREER,  
FIGHT FOR THE  
FUTURE**

*“We have clients—well-known consumer brands—that turn their homepage into an advocacy portal. When you visit their site, all you see is a campaign page and ‘get involved’ button that registers people to vote.”*



**KATHRYN PETERS,  
DEMOCRACY  
WORKS**

Hi it’s Laila from FFTF :)! Thanks for being part of the Red Alert to save net neutrality. Now, call your reps and tell them to vote for the CRA resolution: [202-759-7766](tel:202-759-7766)

It’s super impactful to send your reps a letter too. We can send it for you. What’s your full name?

Jacob Talbot

Hi Jacob Talbot!  
Now, what’s your zipcode? I need it so I can look up your representative.

Credit: Fight for the Future

## TRACK ENGAGEMENT STATS

Track your communications in a centralized CRM or database. Use this data to tailor your outreach to the right people at the right time, and only message people who have expressed interest in engaging with your organization in the recent past. Messaging people who have been inactive for more than a year is usually counterproductive.

*“Keep the relationship context as visible as possible, so that as a conversation evolves with an individual, you keep that context relationship intact.”*



**ADAM DAIGIAN,  
HUSTLE**

*“If you use outdated advocate data, you’re going to yield mediocre results for your advocacy campaigns. The better your data, the better your experience will be in making digital grassroots a powerful part of your overall public affairs strategy. We often help clients with organic advocate acquisition to ensure their data is accurate and up to date.”*



**CHAZZ CLEVINGER,  
ONE CLICK POLITICS**

## ESTABLISH THE RIGHT CADENCE

Your messaging cadence should reflect your audience engagement and specific communication goals. For example, use a higher cadence when sharing news updates with mobile subscribers, and a lower cadence when mobilizing an activist base to contact local representatives or attend an event.

Monitor your response rate. Sending texts too often or after your messages are repeatedly ignored can do more harm than good.

*“If you’re texting people five times to identify them as potential supporters, your fourth and fifth texts are probably a waste of time and money, and you’re definitely oversaturating the channel. Have an eye toward when you’re getting diminishing returns for your texting effort.”*



**DANIEL SOUWEINE,**  
RELAY

## ALWAYS BE TESTING

Find out what works for your audience. We’ve seen people successfully employ a number of messaging techniques, but organizations who see continual improvement in audience engagement share one constant—they’re vigilant about continually testing and refining content, cadence, and strategy.

*“We’ve done a ton of testing. Every text message we send is A/B tested, because we know there’s dramatic variation in engagement between two different types of text messages.”*



**JOSH HENDLER,**  
PURPOSE

*“We’re continuing to test and tweak our messaging frequency. We worked up to three times a week, tried a bit more, and then pulled back. We’re trying to minimize churn but also make sure we’re conveying the breadth of what’s happening in the news any given week.”*



**JOSH HENDLER,**  
PURPOSE

*“Reserve messaging for the most important asks and consider your audience. If you’re messaging a volunteer, you can probably have more frequent conversations. If you’re doing an end-of-year fundraising ask and speaking to a general supporter, you don’t want to send a message every week asking if she’s donated yet.”*



**ADAM DAIGIAN,**  
HUSTLE

*“We try out a really wide range of things, find out what works best, and then make other things like those things. We do this until we find something that works 10 times better than anything else. A lot of testing and iterating is important, as is being fast and loose rather than conservative.”*



**EVAN GREER,**  
FIGHT FOR THE  
FUTURE

# STRATEGY

Your messaging strategy should align your target audience, call to action, and desired outcome. Use these tips to integrate mobile messaging into your overall communications strategy, so you can make the most of every message and drive meaningful action.

## MIND THE DISTRICT

Congressional staffers are more interested in hearing from voting constituents than people outside their district. When building your contact list for outreach or connecting people to congressional representatives, use a person's ZIP code to direct them to the right decision-maker.

*“Congressional members want to hear where you stand more than anybody else. Why? Because you are their boss, and they can’t know what the boss wants them to do without hearing from them in a personal, fact-based, persuasive fashion.”*



SEAMUS KRAFT,  
OPENGOV FOUNDATION

*“To run digital advocacy campaigns effectively, you have to have excellent micro-targeting capabilities. When you’re working on the grassroots level, it’s important to analyze exactly how many advocates you have that live in the districts represented by legislators you’re seeking to influence, because you want to make sure those elected officials are hearing from their own voters and across various demographic segments of those voters.”*



CHAZZ CLEVINGER,  
ONE CLICK POLITICS

## GIVE PROCEDURAL GUIDANCE

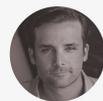
When connecting constituents to their representatives by phone, offer guidance on how to approach the call. Encourage your constituents to engage constructively by adding personal context and detail, so the call doesn't become noise to congressional staffers. A little coaching will increase the efficacy of your campaign.

*“Especially if you’re taking action for the first time, calling a decision-maker can feel high stakes. Instead of trying to pretend it isn’t, acknowledging the importance of rising to that challenge is a critical part of encouraging your members to follow through.”*



CAYDEN MAK,  
EXECUTIVE DIRECTOR,  
18 MILLION RISING

*“If a congressional staffer has somebody on the phone that’s saying, ‘Hi, I’m a constituent, I’m engaged on this issue, and I want to share my view,’ you’re already 90% of the way to a successful engagement.”*



SEAMUS KRAFT,  
OPENGOV  
FOUNDATION

Breaking: senators just moved to force a vote to save net neutrality!  
Call [513-854-0120](tel:513-854-0120)  
(we’ll provide a script).

Credit: Fight for the Future

*“Congressional staffers’ open rates are even better than our users overall, so they are definitely getting and reading our communications. We’ve also had congressional staffers contact us and tell us they want to get in touch with their constituents.”*



MARIA YUAN,  
ISSUEVOTER

## DRIVE THE RIGHT ACTION

Consider what type of constituent engagement will best achieve your policy objective. For example, a click-to-sign petition can demonstrate that many people hold a particular view, but is less likely to change a representative’s policy view than personal letters or calls. Instead, use high-volume outreach to identify the constituents most likely to take substantive action. By tracking engagement, you can target active participants for high-value asks like writing a letter or volunteering at an event.

*“If something takes two seconds to upload, or a second to click to sign, or a second to generate a fax, it’s going to be treated as such by your elected officials. It’s still data, but it’s absolutely going to be weighted as low effort.”*



SEAMUS KRAFT,  
OPENGOV  
FOUNDATION

*“Email still works really well for fundraising, but if you send people an email about a volunteer event, it’s not nearly as effective as sending them a text message.”*



DANIEL SOUWEINE,  
RELAY

Hi Alyssa! We’re having a rally in San Francisco next week. Will you join us to support clean oceans?

Sure, I’m in! Where’s it at?

Awesome, you rock! 6 PM on Tuesday at City Hall.

See you there!

## MANAGE EXPECTATIONS

Naturally, some issues are more ripe for near-term influence than others. Set the right expectations for your supporters. An emerging issue such as Net Neutrality will likely offer greater opportunity for driving legislative action than issues like healthcare or taxes, for which most politicians have hardened positions. Sticky issues require long-term, sustained activity to shift policy.

Focus on the long term, and build your relationship with constituents with an eye on sustained engagement. You don’t want voters to fatigue and lose interest because they expected change to come quickly.

*“[There is a] notion that if you have a really powerful personal story and get through to a staffer on the phone, that’s going to change the Congress member’s core, long-held position. ‘Call now. It makes a difference. This vote’s coming up.’ While it’s true that engagement makes a difference, it’s on a far longer horizon than I think anybody from the outside realizes—both constituents and advocacy groups. Emerging issues are where a constituent can and almost always does make the biggest difference.”*



SEAMUS KRAFT,  
OPENGOV  
FOUNDATION

*“We heard again and again from staffers that the sheer number of phone calls they were getting [on Net Neutrality] was one of the most important factors in their decision. It influenced whether they were going to come out on this issue and what their position was going to be.”*



EVAN GREER,  
FIGHT FOR THE  
FUTURE

# TIME TO GET MOBILIZING

The recommendations in this guide are intended to help you launch your first campaign or apply new tactics to your next one. But these are by no means the only way to develop a successful mobile messaging campaign. If you've developed other strategies based on personal experience, drop us a line. We'd love to hear what works for you.



[team@twilio.org](mailto:team@twilio.org)



[@twilio](https://twitter.com/twilio)



# ABOUT THE CONTRIBUTING ORGANIZATIONS

We're grateful to the people who offered their time and expertise to make this guide a reality. Hailing from both nonprofit and for-profit organizations, these contributors have rare expertise in this emerging field of mobile messaging. Learn more about these organizations and their important work below.

## 18 MILLION RISING

18 Million Rising brings many disparate Asian American communities together online and offline to reimagine Asian American identity with nuance, specificity, and power. Using technology and popular culture, they develop new ways for Asian Americans and our allies to collaborate, create new ways of being, and transform the world around us.

[www.18millionrising.org](http://www.18millionrising.org)

## DEMOCRACY WORKS

Democracy Works is a nonpartisan, 501(c)3 nonprofit organization dedicated to the idea that voting should fit the way we live. They're a team of software developers, public policy wonks, and civic organizers building the tools needed to upgrade the infrastructure of our democracy and improve the voting experience for voters and election officials alike. Their vision is to make voting a simple, seamless experience for all Americans so that no one misses an election.

[www.democracy.works](http://www.democracy.works)

## DOSOMETHING.ORG

DoSomething.org is the largest tech company exclusively for young people and social change. Their digital platform is activating six million young people (and counting!) to create offline impact in every U.S. area code and in 131 countries.

[www.dosomething.org](http://www.dosomething.org)

## FIGHT FOR THE FUTURE

Fight for the Future is dedicated to protecting and expanding the Internet's transformative power in our lives by creating civic campaigns that are engaging for millions of people. Alongside Internet users everywhere, they empower people to demand technology (and policy) that serves their interests.

[www.fightforthefuture.org](http://www.fightforthefuture.org)

## HUMAN RIGHTS CAMPAIGN

The Human Rights Campaign is America's largest civil rights organization working to achieve equality for lesbian, gay, bisexual, transgender, and queer people. HRC envisions a world where LGBTQ people are embraced as full members of society at home, at work, and in every community.

[www.hrc.org](http://www.hrc.org)

## HUSTLE

Through its text messaging advocacy platform, Hustle combines the power of personal, peer-to-peer human connection with a robust technology engine that enables organizations to communicate at scale. With Hustle, you can educate, organize, and inspire people to action.

[www.hustle.com](http://www.hustle.com)

## ISSUEVOTER

IssueVoter is a nonpartisan online platform with a mission to give everyone a voice by making civic engagement between elections accessible, efficient, and impactful. Individuals get alerts about new bills related to issues they care about, send opinions to their representative before Congress votes, and track how often s/he represents them.

[www.issuevoter.org](http://www.issuevoter.org)

## ONE CLICK POLITICS

One Click Politics is a nonpartisan, grassroots advocacy software company that provides cloud-based technology solutions to public affairs and government relations professionals in the U.S., Canada, and Australia. Their mission is to provide a comprehensive and innovative approach to digital grassroots strategy that supports an organization's larger public affairs strategy.

[www.oneclickpolitics.com](http://www.oneclickpolitics.com)

## OPENGOV FOUNDATION

The OpenGov Foundation is a fiercely apolitical nonprofit 501(c)3 organization dedicated to serving those who serve the people in America's legislatures. Their mission is to create a 21st Century Congress where elected officials and staff can meaningfully engage at scale with those they represent, and where citizens can see, shape, and understand the critical decisions that affect their lives, their families, and their businesses.

[www.opengovfoundation.org](http://www.opengovfoundation.org)

## PURPOSE

Purpose is a public benefit corporation that builds and supports movements to advance the fight for an open, just, and habitable world. They use public mobilization and storytelling to help the leading organizations, activists, businesses, and philanthropies engaged in this fight, and create campaigning labs and new initiatives that can shift policies and change public narratives when it matters most.

[www.purpose.com](http://www.purpose.com)

## RELAY

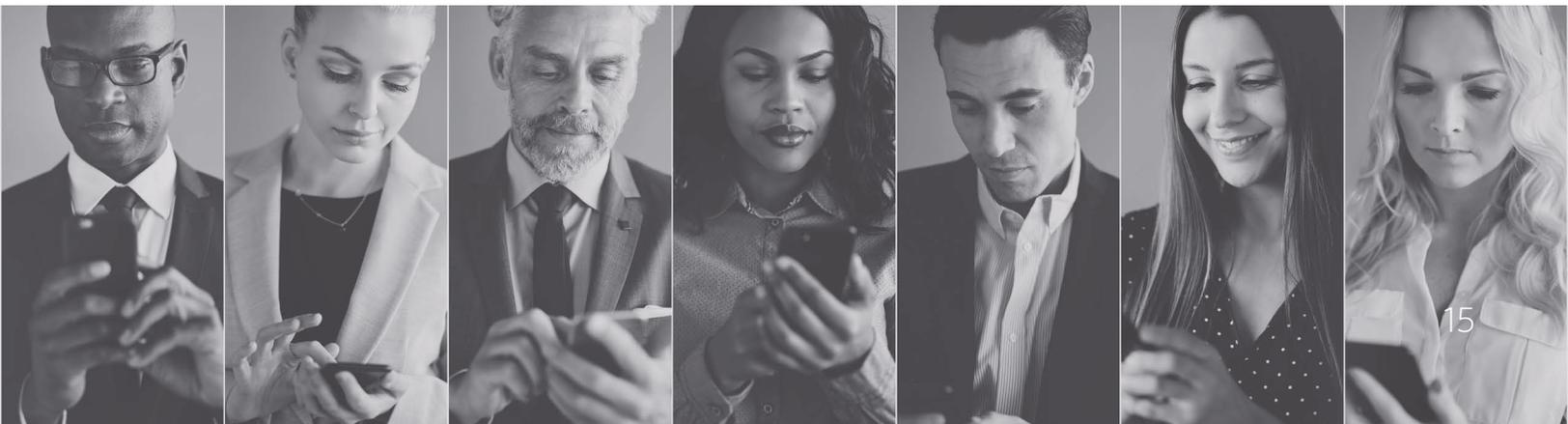
Relay is a peer-to-peer text messaging platform that facilitates large-scale one-to-one communication via SMS. More than 250 progressive organizations and Democratic campaigns use Relay to identify supporters, recruit volunteers, raise funds, and remind people to vote.

[www.relaytxt.com](http://www.relaytxt.com)

## SIERRA CLUB

Founded by legendary conservationist John Muir in 1892, the Sierra Club is the largest grassroots environmental organization in the U.S., with three million members and supporters. Their successes range from protecting millions of acres of wilderness to helping pass the Clean Air Act, Clean Water Act, and Endangered Species Act.

[www.sierraclub.org](http://www.sierraclub.org)





## ABOUT THE AUTHOR

Jacob Talbot leads marketing for Twilio.org. He loves working with organizations to develop creative ways to use communications to create positive impact. When not peddling software, he's often found pedaling on the roads and trails in the Bay Area.