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Hustle



### **A Note From Our Team**

Welcome to the midterms! Primaries are happening across the country and things are ramping up! While we can acknowledge that there is so much stake, we are equally excited to see the ways candidates, campaigns, state parties and organizations are gearing up to fight and protect our democracy.

We hope this playbook can serve as a great resources that highlights some of our best tips and practices for planning a solid text campaign using Hustle. You can use this playbook to learn more about our features, access sample scripts and implement our quick and easy text campaign timeline.

Last but certainly not least, we also want to say thank you for choosing Hustle, it's an honor to be a small part of your campaign as you engage with voters, supporters and volunteers. We're rooting for you. Let's win!

LaToia, D'Shawna and Noureen

#HustlewithHeart2022



# What Can You Hustle?

Deciding how you will use
Hustle to engage voters and
volunteers is key to success.
Here are some of the common
uses political campaigns
have for Hustle:

- Supporter ID
- Persuasion
- Volunteer Recruitment
- Grassroots Fundraising
- Event Recruitment
- Volunteer/Attendee Follow-Up
- Ballot Chasing
- GOTV Volunteer Recruitment
- GOTV Make a Plan to Vote
- Story Telling-Share Video/Digital
   Content









475m+
Texts Delivered

Messages sent between voters and organizers

100% Uptime Reliable and stable for our customers every single day 1,500+

Democratic Campaigns and Committees

Used Hustle for fundraising, recruiting volunteers, and GOTV

31 State Parties
Used Hustle to text Democrats across the country

75,000+ Texters

Volunteers and Organizers personally texted millions of Americans

Thank you to all our partners, volunteers, and voters!

#### **OUR IMPACT:**

### 2020 Recap Accelerate Voter Engagement

Hustle was a communication conduit in accelerating voter engagement in the 2020 political election. Today, Hustle is more widely used than ever before. Hustle is very proud to have worked with and supported over 1500 campaigns and 31 state parties delivering more than 475 million text messages on behalf of Democratic and progressive groups in the 2020 Presidential election

### What's New with Hustle for this Election Cycle?

Link Shortening & Tracking	Admins can upload custom images that will preview for designated links sent to contacts to encourage more engagement and higher click through rates. Clicks on these links will then be tracked and at the discretion of the admins, those who click can be included in follow up "reminder" workflows.
Shared Strategy	Contacts are distributed in Goals based on their assignment states (unassigned vs. assigned). In the Shared strategy, there's only one thread of conversation history between Agents and the Contact in the group; this helps keep the Contact's conversation history consistent throughout Goals and changes in assignment.
Script Preview & Analysis	Send a test to your phone to preview scripts before sending. Test texts can be sent for any script, initial or additional, in all Goal states from the script edit screen. While Admins write scripts, Hustle will analyze what's being written and make recommendations to make sure best practices are being followed and the script doesn't get flagged as spam by carriers.
Public API	The Hustle Public API exposes a RESTful interface to provide programmatic access to resources within your Hustle account. The API is defined using the OpenAPI specification (aka Swagger) which can be downloaded above and used to generate a client in various languages. This may help speed up integration with the API, but is not required.



### What's New with Hustle?

Hustle Studio	Admins can upload custom images that will preview for designated links sent to contacts to encourage more engagement and higher click through rates. Clicks on these links will then be tracked and at the discretion of the admins, those who click can be included in follow up "reminder"
Hustle Stories	Hustle Stories are the video campaigns Admins can create in Hustle Studio to share with Contacts using Hustle Goals
Script Library	Save scripts at the organization level and then add those scripts to Goals. In addition, you can also make certain scripts "default" meaning that you can designate them to appear in all Goals in the org automatically.
<b>BroadCast</b> (Coming Soon)	Hustle will introduce broadcast functionality by the end of Q2 of 2022. Early available versions of the product will include: Automated initial message delivery & efficient message handling,a Shared Inbox for admins to manage replies in real time ,support for MMS, Hustle Studio Integration, Rich Targeting Capabilities & Fast Deployment.



**REMEMBER:** We're always making Hustle better for you. Head <u>here</u> to check out our new updates!

### **10DLC Compliance**

Hustle is a fully 10DLC compliant platform that prioritizes technical excellence and seamless user experience.

*Note*: Political Committees must also get a <u>Campaign Verify</u> token, which happens outside of Hustle.

#### What to know about 10DLC with Hustle

- 10DLC Registration is an easy
   2 step process within the platform.
- Political specific resources are provided, including demo videos & step by step guidance.
- 3. We're here to support! Hustle also appeals low TCR scores on behalf of our clients.
- 4. Users can choose the specific area code (pending availability) for their 10DLC messaging.

We found the Hustle platform easy to use and the technology allowed our campaign to reach a big part of our universe of voters. Our campaign relied on texting because it is an innovative and efficient way to reach voters.

MARIA ANDRADE Campaign Manager, Nikema Williams Campaign





# Getting Started

Hustle

# **Your Campaign Timeline**



#### **BUILD YOUR TEAM**

- Build Volunteer Base
- Small Dollar Fundraising
- House Parties & Fundraising Events
- Message Testing



#### **FIND YOUR SUPPORTERS**

- Expand Persuasion/ID Universe
- Re-solicit Donors
- Ramp up Volunteer Recruitment



#### **TEXT OUT THE VOTE!**

- Ballot Chasing
- Multiple Passes of your GOTV Universe
- Confirm Election Day Volunteers

3

4

5



#### **GET THE WORD OUT!**

- Volunteer Recruitment
- Pledge chases
- Persuasion texts to swing voters
- ID Low Propensity Voters



#### **ENGAGE!**

- Build your GOTV Volunteer Team
- Finish 2nd pass of your Persuasion Universe
- Ballot Chasing
- Early Vote GOTV



### Who to Text?

When deciding your Hustle, consider which audiences you want to target over text message:

- ID Universe
- Persuasion Universe
- Potential + Existing Volunteers
- Event Attendees
- GOTV Universe

In addition to these universes, think creatively about groups of voters who may be more receptive to text message over other mediums of communication. **College students** and **young professionals** often don't have landlines or long term addresses, making them **great text targets**. Also consider voters who are not easily accessible door-to-door, such as **rural targets** and **targets living in secure apartment buildings**.



### When to Text?

#### When texting with your voters:

- Never text too early or too late. You want to be respectful
  of people's sleep/personal time. Use the Hours of
  Operation feature to limit texting hours for staff/vols.
- Plan your text outreach in conjunction with your phone banks and canvasses to maintain efficiency.
- Avoid making too many separate asks within a short time frame (volunteering, donating, attending event, etc...). Appointing a single Hustle point person will help avoid overwhelming your contacts with too many text messages at once.



### **Team Roles**

There are **three** types of users in Hustle: **Organization admins**, **Group admins**, and **Agents**. Each member of your text team should have specific access based on their expected use of the tool. Permission can be modified for group admins for the upload contacts and export data features..

User(s) have the ability to:	Org Admin	<b>Group Admin</b>	Agent
Send Messages	•	•	•
Upload Contacts	•	•	
Export Hustle Data	•	•	
Create & Edit Goals	•	•	
Review Agents' Conversations	•	•	
Create & Delete Tags	•		
View Analytics Reports			
	•		



#### **Getting Started**

# **Capacity**

#### Who will do the texting?

Depending on the size of your campaign team, you can consider the following:

- 1. **Senior Campaign Staff:** Org admins
- 2. **Regional Directors:** Group level admins
- 3. **Organizers/Volunteers:** Group-specific agents

Smaller campaigns should not use "group level admins" for capacity purposes. Also consider: 1) the total number of contacts in your org as you create groups, and 2) the total number of groups in your org as you determine roles and levels of access.



# **Setting Up Your Org**

You should treat your groups as **location-centric communities** of contacts, comprised of your supporters, donors, and volunteers. Groups are the best way to organize both your universe and your staff in Hustle.

If you intend to have a robust field program with multiple regional directors and organizers, consider creating groups at the **Organizer Turf** level. Your regional directors can serve as **group admins**.

- Group admins can do the following:
  - Add agents
  - Import lists from VAN or upload via CSV
  - Create goals and sync them with VAN
  - Group admins cannot create tags or custom fields.
- Org admins can go to Settings to review group admin access:



\*\*Please refer to the section in this guide on Targeting and Tags for more details on tagging during the import process.



## **Receiving and Giving Trainings**

You didn't think we'd make you figure this out on your own, did you?! Take a look below to review our various training and support resources.



#### **Onboard training**

Your Hustle point of contact is here to make sure you receive an in depth onboarding as you roll out your program, but make sure you check out our **Admin Onboarding Videos** — a playlist of short videos that show you how to get up and running in the admin panel!



#### **Check out our Hustle Guides**

Our <u>Admin Quick Start Guide</u> is a checklist that will guide you through launching your first Hustle. Review Hustle best practices <u>here!</u>



#### **Contact Technical Support**

While in the admin panel, you can reach our support team by clicking the blue help button in the bottom-right corner of the page.

You can also reach our technical support team by emailing <a href="mailto:support@hustle.com">support@hustle.com</a>



#### Visit help.hustle.com

Our <u>help center</u> provides answers to FAQ and has additional <u>admin guides</u>, <u>app guides</u>, and resources to support you and your team throughout your Hustle use.

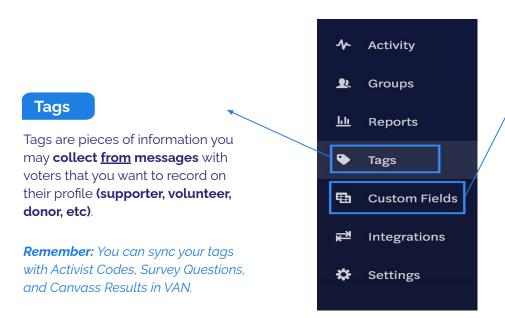




# **Targeting**

\*\*Please refer to the section in this guide on Targeting and Tags for more details on tagging during the import process.

**Tags** and **Custom Fields** are powerful tools in Hustle to help you filter and target your lists. But what is the difference between the two?



#### **Custom Fields**

Custom fields are data points that you can use to filter your list **or** information you include in your **message** <u>to</u> **voters** (**polling location, county, city, donation date, etc)**.

**Tip:** You should determine early on which custom fields you want to use in Hustle so you can review the quality of your data. Without high quality data attached to your contacts, your use of custom fields will be limited.

## **Tags**

Tags have different visibility levels and functions.

•	vailable for organizers to use on contact profiles. You can modi	, , ,
	t reason instead, or hide it from organizers. All tags are availabl	e and visible to admins
Add new tag	Save	
Tag name	Where tags are visible	Actions
donor	Lead profile Opt-out reason Admin eyes only	Edit ▼
volunteer	Lead profile Opt-out reason Admin eyes only	Edit ▼

**REMEMBER**: You can refer to your Political Campaign Starter Kit or **help.hustle.com** for more info on syncing tags to VAN.

**Lead (contact) profile**: This is the default use for tags. Lead profile tags are the tags that agents will be able to see when they are Hustling. Lead profile tags help your agents collect those bits of information about the people they text (supporters, donors, volunteers, etc...).

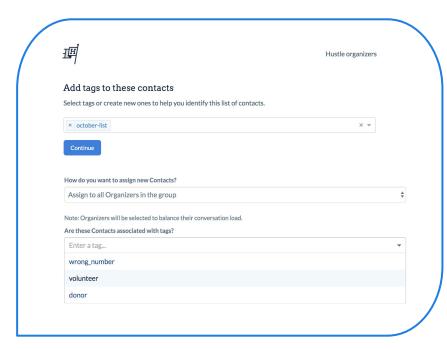
**Admin eyes only**: This status is for tags that are for the administrator view in the admin panel only. Agents will not be able to see or note these tags.

Opt-out reason: This allows you to create a 'tag' specifically when agents opt out a contact. Opt-out reasons can be noted by the agent to help you better understand why your contacts are opting out (wrong number, moved, non-supporter). Remember, opt-outs are permanent in Hustle, but they do not sync with VAN on their own. Tags will help you record opt-out reasons in VAN.



## **Applying Tags**

Tags can be applied to contacts when they are imported into Hustle.



When **pushing a list from VAN**, you can apply a tag to everyone in the list at this stage.

TIP: Remember that this function does not tag the list, but rather, it tags each individual contact in the list. If the tag is synced with VAN, then the tags will apply to the contacts' VAN profiles. Avoid using more than one tag.

<u>TIP</u>: If you create a "wrong number" tag and sync it with the "wrong number" canvass result in VAN, please be aware that VAN will automatically hide the preferred number in the contact's profile, which may not necessarily be the cell number. To avoid this action, you can leave the "wrong number" tag in Hustle unsynced OR you can create a "wrong number" activist code in VAN and sync it with your Hustle tag.

After you've **uploaded your CSV**, select the tag you want to apply your contacts by clicking the drop-down menu under "Are these Contacts associated with tags?"



### **Targeting with Tags**

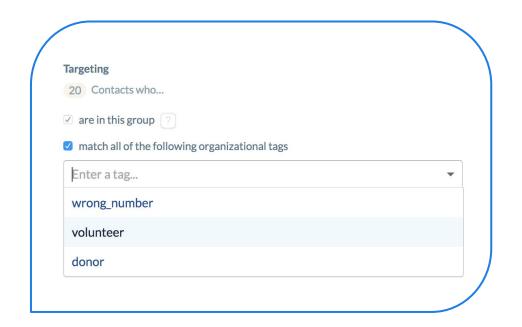
Tags can help you narrow your list when you are creating a goal.

In the Goals tab, click the **Create a Goal button**. From there, you can do the initial goal set up.

In the Targeting section, select either:

- "match all of the following organizational tags"
   This will target only the contacts that are assigned with the tag.
- "don't match any of the following organizational tags"
   This will exclude any contact assigned with the tag.

After choosing the option, select the desired tag in the corresponding drop-down menu.



We chose Hustle because the platform was user-friendly. It was an essential tool that helped us leverage sophisticated targeting across our organizing program, which helped us win 90% of the vote in our primary, and ultimately led to Sarah winning her seat in Delaware's state senate.

PHOEBE LUCAS McBride Campaign Manager, Sarah McBride Campaign





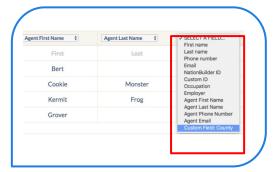
### **Custom Fields**

Custom Fields can help you target or filter your lists uploaded from a CSV file.

Let's use "County" as an example. Make sure your **CSV file has a targeting column** added with the target custom field, as shown in the example:



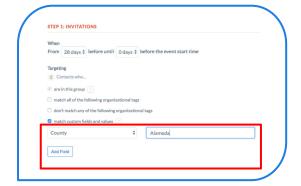
Upon uploading the CSV, you'll need to select the "Custom Field: County" option in the drop down menu; the values from the CSV will populate as custom fields under this column.



In the **Targeting** section of creating a goal, select the **"match custom fields and values"** option. Note: these actions are the same whether the list is from a CSV upload or a VAN import.

Select relevant custom field in drop down.

Enter the value (i.e. Name of county) you wish to target.



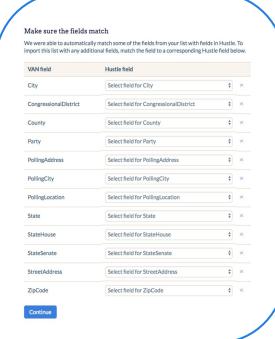


**REMEMBER:** You can now add multiple, comma separated values when targeting. For example, you could type in "Alameda, Sacramento" to populate a list containing targets from both counties.



### **Applying Custom Fields**

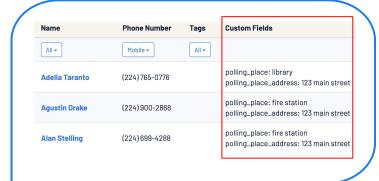
Learn to map Custom Fields from VAN.



After you create your list in VAN and begin the import process through the SMS button, you will see this screen.

Here, you can **map the fields from VAN** (VAN field) as long as you have created an equivalent custom field in Hustle. **See Image 1** 

**Tip:** You can **apply custom fields to contacts you have already pushed into Hustle from VAN**. You simply need to re-pull the list > map the desired custom fields on this screen > press continue. This action will append the custom fields to the existing contacts in Hustle. To confirm the custom fields have been applied, go to the Group where the contacts live > click on the Contacts tab > look under Custom Fields. **See Image 2** 



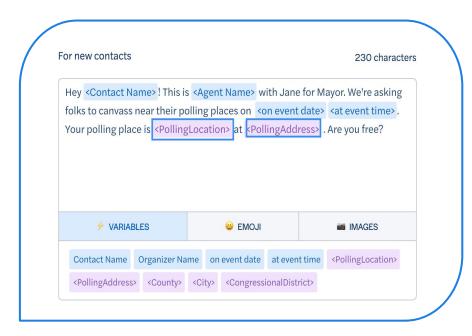
lmage 2

lmage 1

Hustle

## **Insert Custom Fields into the Script**

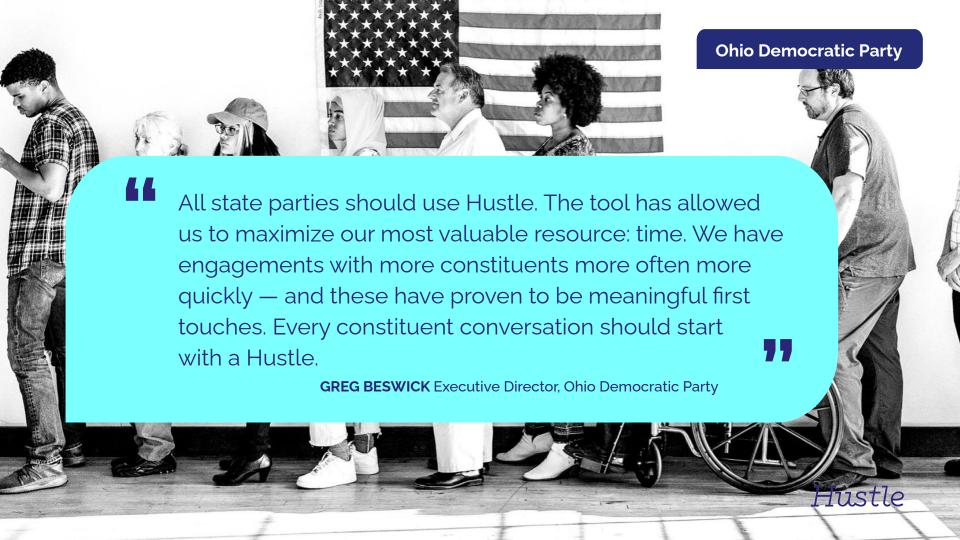
Apply custom fields to your scripts for more dynamic and personalized messaging.



Once you have added custom fields to Hustle, they will appear on the Goal Creation/Goal Edit screen below your script. If you click on the custom field, it will populate in your script in the form of a blue bubble.

Note: Adding a custom field to a script will impact the targeting for the goal. Only contacts in the group that have a value for that custom field will be included in the goal. If your live goal has no contacts or the incorrect number of textable contacts populating in agent workflows, your goal may be filtering out contacts because of custom field use! If you include a custom field in the script in a group where no agents have that custom field, contacts will not be added to that goal's workflow, or will show as 100% completed with 0 contacts made.





# **Scripting**

Follow these best practices to ensure you keep your voters engaged.

**Treat people like people.** If the first time you're texting them is GOTV, you may see some success, but you won't reach your full potential.

- Avoid a hard ask in the initial text
   Start a conversation to engage them without oversharing.
- Emphatic upbeat language
   "It would be really awesome if you could join"
- End with questions to elicit a response "Can you make it?"

Casual tone

"A bunch of us"

Avoid short links

They could be marked as spam by the carrier

Include an action item

Always include an action item - regardless of how small it is. Keep people engaged!



**REMEMBER:** Don't always text with an ask. Space out your asks by thanking voters for their support/time/money as a follow up after the action has been completed. This will make them feel valued.

### **Volunteer Recruitment**

**Leave a good first impression** - Don't do a hard ask in the initial script.

**Utilize Tags** - Use Volunteer tags when you create your goal to narrow your list to people that you've identified as volunteers.

Import Contacts from MyCampaign - Be sure to import your volunteers from MyCampaign. They have a unique VAN ID which you'll need in order to sync responses back to events in MyCampaign.

**Additional Scripts** - Don't put all the information in your initial script. Have an additional script for location, days, and different shift times.

**Reminders** - **ALWAYS** enable and send reminders. Add something personal, "I'm picking up snacks, salty or sweet?" Hey Chris! It's Krishna from Dee for Senate! A bunch of folks are meeting up at our HQ to text voters. Can you join us? We'll have snacks!

Well since you mentioned snacks.. I'm def interested! When and where?

⇔It's Thursday at 6pm! The address is 123 Main St. Are you free?!

Count me in! I'll see y'all Thursday!

# **Persuasion & Supporter ID's**

**Start Early** - Begin your persuasion early! You wouldn't wait until GOTV to start canvassing. Treat texting the same way. Text your universe early to weed out people that have moved, have a wrong number, or are non-supporters. Remember, it is far less labor intensive to find out someone has moved over text than to knock on their door.

**Think about who you are texting** - Utilize texting to reach out to swing voters and low propensity voters that you may not have in your canvass or phone universe. Think about voters you are unable to contact through canvassing or phones, such as rural voters or

**Short and casual -** Don't bombard voters with a long text. Stick to a short intro message with an open ended question at the end. You want this to be a personal conversation, not a blast text.

**Additional Scripts** - Utilize the Additional Scripts feature for adding more information about your candidate, about specific issues, or links to fundraising, ads, or your website.

**ID for GOTV** - ID your supporters and then turn them out to vote on Election Day!

Hey Chris! It's Krishna from Zandria for Senate! The Election is right around the corner & it's gonna be close. Can Zandria count on your vote?

Sure! She believes in strong public schools where teachers are paid fairly & here's my fav - She'll fight for paid family leave for ALL Americans.

That's pretty cool! I'm def interested! Can you send me any more info on her?

Great! Check out <a href="https://www.zandria4senate.com/issues">www.zandria4senate.com/issues</a> for more details on her platform! You can also sign up to volunteer there



### **Text Out the Vote**

**Get your supporters to vote** - Target voters that you've ID'd as supporters throughout the campaign.

**Early Voting** - Send reminders about Early Voting dates or instructions for absentee voting.

**Utilize Custom Fields** - Include custom fields in your scripts to send supporters information about their polling location or early voting location. Remember to verify that your data is accurate and up to date!

**Make a Plan** - Ask supporters if they have a plan to vote, when they're voting, and if they know how they are getting to the polls.

**Multiple Passes** - Text your universe multiple times during GOTV to make sure everyone has the info they need to vote on Election Day. Create and apply an "Already Voted" tag to the goal for each pass to exclude early voters.

**Additional Scripts** - Utilize additional scripts to include information about the polling location, early voting location, or a link to request an absentee ballot.

**Follow Up** - Use the voting history in Votebuilder to see if voters early voted or requested an absentee ballot, then reach back out to them if they didn't!

Hey Chris, Krishna here again w/Roddy for Senate. It's crunch time & we need you! Did you get a chance to vote early for Roddy?

I haven't yet, but I'll vote on Election Day

Awesome, do you plan to before work or after?

Hmm I should go before since I get stuck at work a lot

And are you driving or taking The Metro to the polls?

I"ll Uber there. Do you know where I can check my polling location?

I have it! You vote at Shaw Library on 1630 7th St. NW. Thx for your support Chris!





### **Event Attendance**

**Get the conversation going** - Don't give all the info in the first text. Engage them with the ask and then share the details.

**Start Early** - Don't wait until the last minute to invite supporters to your event. Send out invites a week in advance so you have enough time to send a second round of reminders.

**Encourage them to brings friends!** 

Sync your Hustle goal to an event in VAN by adding the Event ID.

**Additional Scripts** - Use additional scripts to include more information about the event, a link to the sign up page, or more information about your candidate.

**Reminders** - Enable reminders for your goal. Send out the reminders a couple days before your event to confirm that supporters can still make it.

Hey Chris! It's Krishna with Roddy for Senate! How would you like to meet Roddy this Saturday!?

That sounds awesome! Tell me more...

He's going canvassing at 11 am and we want our supervols to show him the ropes! You in??

I"m not the biggest fan of canvassing, but if Roddy is going to be there. . . can I get a pic w/ him??

Of Course! The whole gang is going to be there, so you know it's gonna be a good time. Don't miss out!

Now you're giving me FOMO. Okay I"ll be there! See you and Rodday Saturday at 11!



## **Fundraising**

**THINK ABOUT WHO YOU'RE TEXTING** - Use texting to re-solicit small dollar donors, ask strong supporters for a small dollar donation, or re-engage donors that have unsubscribed from emails.

**BE PERSONAL** - Don't use a hard ask in your initial message. Announce exciting news about your campaign, then follow with an ask. Give them context for why they should donate. When you do ask, make it a soft ask before stating a specific amount.

**LINKS** - Be sure to include a fundraising link, **but don't put it** in your initial message. Ever!

**SNAIL MAIL CHASE** - If you send snail mail to donors, follow up after a week or so to check if they received it and if they want to donate!

**FUNDRAISING EVENTS** - Focus on the event and inviting your supporters, but let them know it will be for fundraising. Make the event sound appealing and fun.

Hey Chris! It's Krishna here w/ Roddy for Senate! Did you catch Roddy's performance in last night's debate?

Hey there, yeah he did a pretty good job. Sounds like he's really into education

Yep, he knows education is key to help communities thrive. Can you pitch in \$7 to help us launch a bus tour so Roddy can talk to voters all over the state about his vision?

I think I can swing \$7 to help out. Where do I donate?

THANK YOU! You're the absolute best!
The link is <a href="www.helproddygetelected.com">www.helproddygetelected.com</a>
We couldn't do this w/out you!





### **Maximize Your Efforts**

Follow data best practices to ensure you're able to retrieve maximum data from your text:

Sync your goal to a VAN event - Before you send out any texts be sure to sync your goal to an event in VAN.

**Use Tags** - When you find supporters (or non-supporters) utilize tags to sync those responses to survey questions within VAN.

**Targeting** - When you create your goal, use tags to effectively target voters you want to talk to. For example, exclude volunteers and non-supporters from your goal.

**Multiple Passes** - Send out a second round of GOTV texts! Export Data from your goal, import the contacts that have "outbound" in the inbound/outbound column, and tag them as "Replied." Then, when you create your Round 2 GOTV goal, exclude contacts with the "Replied" tag.



# **Exporting Your Data**

#### **Export Levels**

#### **Org Level Export:**

- Org > Settings > Group Settings > Data Export
- Available Data
  - Actions: Displays all actions taken on leads at org level
  - Messages: Displays all messages to and from leads at org level
  - Leads: Displays key info for leads at org level, including group name and tags

#### **Group Level Export:**

- Org > Groups > Group of Choice > Group Settings > Data Export
- Export Contacts
  - Displays group-wide contact data, including tags and custom fields
  - Displays all messages to and from leads at group level

#### **Goal Level Export:**

- Org > Groups > Group of Choice > Goals > Goal of Choice > Drop Down Button Next to Edit
  - Displays only contacts who have received an action from the toggle
  - Displays the action type





# Need help?

# Don't worry, we're here for you!

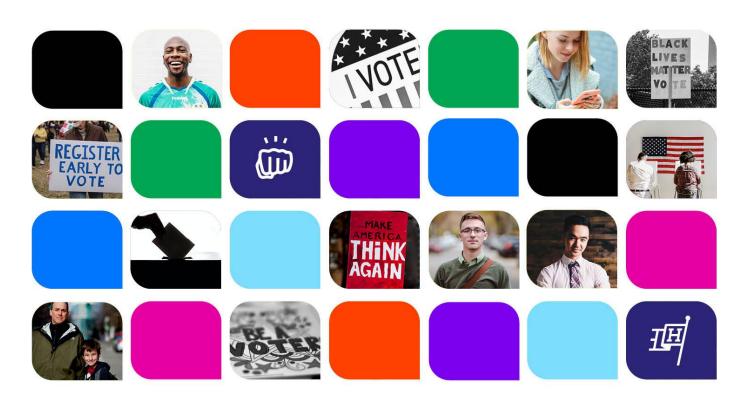
<u>campaigns@hustle.com</u> Email our campaigns team with any product questions you have.

**<u>help.hustle.com</u>** Our FAQ knowledge center is packed with visual how-to guides.

**blog.hustle.com** Hustle news, product updates, and advanced tips.

<u>support@hustle.com</u> Email our support team for a quick reply to any technical issue you're having!





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