Automation Technology

ACCELERATING OUR WORK

NationBuilder

wrike

_zapier

Project Management • Relationship Management • Automation

Agenda

- 7:00 p.m. Project management using Wrike

- 7:30 p.m. VoteBuilder vs. NationBuilder

- 8:00 p.m. NationBuilder tagging

- 8:15 p.m. NationBuilder profile management and data sync
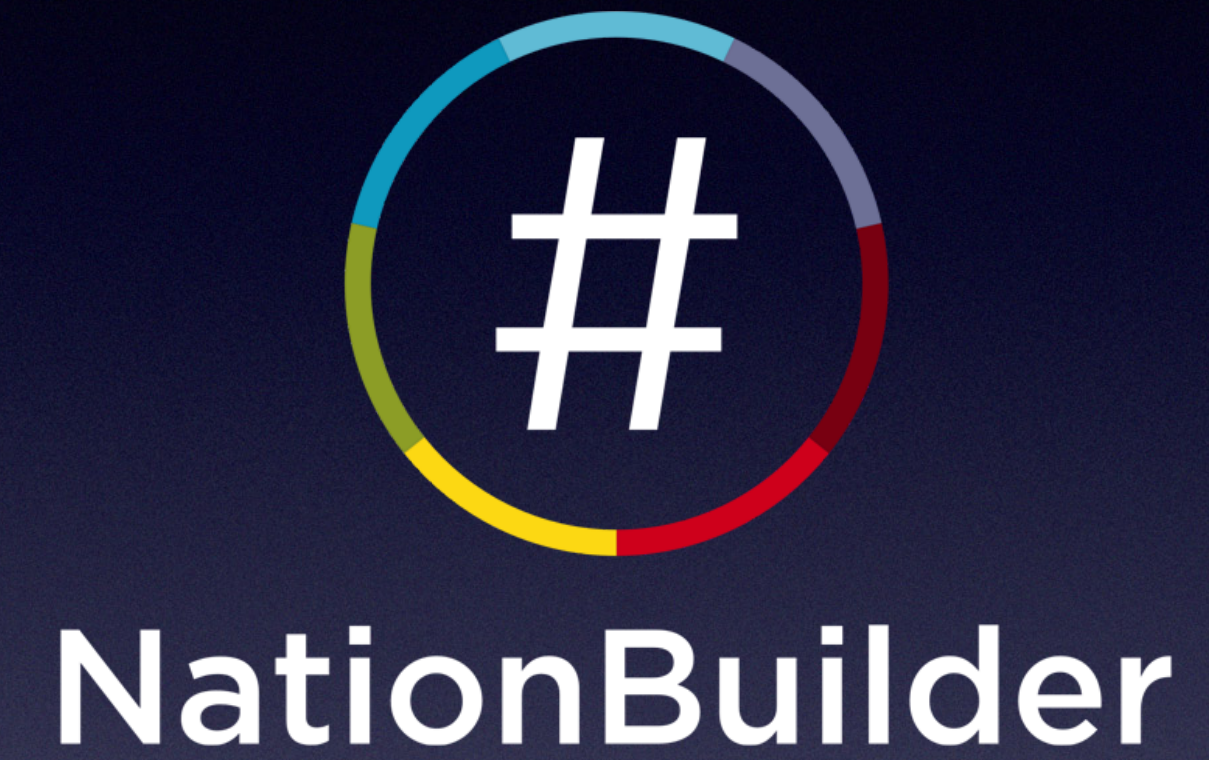
- 8:30 p.m. Election canvass reports

How to use Wrike

ngpvan
VoteBuilder

 # NationBuilder

What's the difference? Why do we have both?

NationBuilder and VoteBuilder are both CRM* systems

*Customer Relationship Management

VoteBuilder

- Data management for **voter** records

- Finding and contacting **voters**

- Recording **voter** contact activity and results

- **Voter** walksheets and phone banking

- **Voter** demographics and behavior analysis (prediction)

NationBuilder

- Data management for **volunteer** records

- Finding and contacting **volunteers**

- Recording **volunteer** activity and results

- Soliciting and accepting donations from **volunteers**

- Oh, and it's also our website

VoteBuilder <—> NationBuilder

Frenemies that speak a common language
(More on that later)

NationBuilder Tagging

Following   Add tag

Dashboard   Settings   **Event settings**   Subpages   Template   Files 6   More ⌄

Basics   **Advanced**   Intro   Location   Autoresponse   Text keywords   Tickets   Hosts   RSVPs   Attendees

RSVPs

After RSVPing, what page should they land on next?

| make_a_donation |

Just type the slug.

Actions

Tag RSVP with

| #2023-02_CCMtg |

Separate multiple tags with commas

Tags

All   **Shared**

New tag

🔍 @   ▾   ⊗   **Clear results**

1 - 50 of **64**   ‹   ›   Actions ▾

Name	Status	Taggings
@2017-04_CCMtg		66
@2017-05_CCMtg		67
@2017-07_CCMtg		38
@2017-08_CCMtg		29
@2017-10_CCMtg		68
@2017-11_CCMtg		67
@2017 Holiday Party		31

Tags: we hate them and we love them

- Powerful way to categorize actions

- Easy to create, easy to make a mess

- Must follow a naming convention to be useful

- Think about how you would use them to search

- Watch out for tags on cloned events; most likely they need to be edited

Using VoteBuilder
to update NationBuilder

- Political districts in VoteBuilder are the single source of truth

- NationBuilder records are not auto-updated

- We must export records from VoteBuilder and import them into NationBuilder to refresh the political districts

- We could do this manually, but why would we want to?

NationBuilder data is not exactly the same as VoteBuilder's

CD	SD	HD	CountyBoardName	PrecinctName	PrecinctAndCode	TownshipName
11	32	63	5	Nunda 20	Nunda 20 NUN20	Nunda
11	32	63	5	Nunda 22	Nunda 22 NUN22	Nunda
11	32	63	5	Nunda 6	Nunda 06 NUN06	Nunda
11	32	63	5	McHenry 32	McHenry 32 MCH32	McHenry

(TEXTBEFORE(PrecinctName 000, " ") &" " & NUMTOBASE(RIGHT(PrecinctName 000,2),10,2))&CONCATENATE(" ",UPPER(LEFT((TEXTBEFORE(PrecinctName 000, " ") &" " & NUMTOBASE(RIGHT(PrecinctName 000,2),10,2)),3)), (RIGHT((TEXTBEFORE(PrecinctName 000, " ") &" " & NUMTOBASE(RIGHT(PrecinctName 000,2),10,2)),2)))

Profile Hygiene

- Duplicates happen, all the time

- Email address is the unique key in NationBuilder

- Data accuracy requires vigilance

- Good data produces good results