

Practical Tools for Campaigning

A short pamphlet with three practical tools and a wrap-around approach to help kickstart or re-energise your campaigning for change.

Introduction

This short pamphlet sets out [my simple and practical approach to campaigning](#), which has been tried and tested around the world over the last 20 years. It is all rooted in a simple understanding of campaigning, which is around having a clear problem, knowing the solution to that problem, knowing who has the power to make that change, and then seeking persistently to influence that person directly and indirectly to get the change you want to see. This definition is best explained by [the cookie story](#).

Over the years my approach to helping people to campaign has moved on from a five day course to now being able to condense the basics into a one hour session. I have [my published book on campaigning](#), which gives all the details and examples of my approach, but this pamphlet is an easy and accessible entry point for this approach to campaigning.

This pamphlet sets out three practical tools and then a wraparound approach aimed at helping you to get your campaign moving. It is all predicated on the fact that you need a robust understanding of your external environment.

Before you start doing any campaign planning, it is so important to discuss with as wide a group of people as possible [your understanding of the external environment](#). Unless you have a robust understanding, you run the risk of running a fantasy campaign. Your campaign needs to be rooted in the reality of your outside world.

I really hope that you find this pamphlet helpful. It's all about getting you started or re-energising your approach, and [do look at my website](#) if you want more information at a later point.

First campaigning tool: the Elevator pitch

I'd like you to imagine, if you would, that you enter an elevator or a lift, and the one person that you have been waiting months to speak to steps into that very same elevator with you – how do you use the next 15 to 30 seconds?

This is the elevator pitch. To my mind, it is one of the most essential building blocks for your campaign. It is your tried and tested ability to communicate the essence of your campaign - your problem and your solution - in a succinct and compelling manner, finishing with a request for action. It sounds so easy, but it is actually quite difficult to do, and it is one campaigning tool that requires a lot of practice.

The beauty of the elevator pitch is that it is your entry point showing your ability to speak with an absence of ambiguity to convey the essence of your campaign finishing with a call to action.

If you can develop your elevator pitch for your campaign, it means that you are always ready, you will not be searching for the right words because you are prepared and the words will come. Having an elevator pitch is like being able to explode out of the blocks when you are sprinting.

So, in your pitch, having introduced yourself, you need to set out what **problem** your campaign is focused on, possibly also including a line on your evidence. The challenge is whether you can distil your problem into a few words.

You can then move on to your **solution** and set up what you think needs to happen for this problem to be tackled. Again, your challenge is, can you distil your solution into a few words?

Having conveyed both your problem and your solution, you can then move on to your **ask** - what are you going to ask the recipient of your pitch to actually do?

For me this tool is a great example of needing to apply the TEA test in your campaigning. An effective campaign needs to touch, enthuse and then get an action – TEA!

At this stage, possibly the best thing that I can do is to share with you, an elevator pitch that I have used in the past. *Many years ago, I was working for the Red Cross in the UK, and we were running a campaign to ensure that all children in English schools learnt first aid. If I was to have met the Education Minister, I can still remember what my pitch would have been:*

“Hello Minister. I’m Jonathan from the Red Cross. We are really concerned that only one in five schools in England teach their children basic first aid skills. We would like to see a generation of lifesavers come out of English schools. Would you meet with me to discuss how we might make this goal happen?”

Reflecting on my words, it does all sound so simple. But I know from my work around the world that people do find it very hard to develop an elevator pitch, particularly on

an issue that they care about so passionately and on which they know so much. Yet I fundamentally believe that being able to be ready and poised to convey your basic campaign message, at any time, is such an important building block for your campaign. But it needs practice. You need to practice your message so that it becomes instinctive. So that you never knowingly lose a chance to make your pitch!

Second campaigning tool: the Influence Tree

One of the first campaigning tools that I learnt was the influence tree, which I still use to this day. You start out by trying to answer these key questions:

- Who has the power to make the change you want to see?
- Who influences that person?
- How can you seek to influence those people to influence your target?

The critical starting point is working out who actually has the power, if they were to decide to agree with you, to make the change you actually want to see happen.

Having identified and named your target individual, who will be situated at the top of your tree, it is then worth asking yourself whether you are able to approach them directly. I have run campaigns in the past where I have both been able to go directly to make my case, but also where I have been blocked from going directly. But it is always important to ask yourself whether it is possible to go directly.

It is then good to do some thinking about your target. What do you know about them? Who or what influences them? Who has access to them, who could potentially be your messengers?

The more that I have done campaigning, the more that I have begun to realise that whilst a strong campaign **message** is really important, it can be equally important to think about who are the most effective **messengers** to convey your campaign message. Sometimes, for us campaigners, we may not be the most effective messengers of our own campaign message, but we might look to support others to convey our message.

Your tree shows the different routes to influence your named target at the top of the tree. One route will be the direct route - is that an option for you? But then you need to think about: what are the other routes you could go down? The influence tree makes you think hard about your target and what are the other possible routes to seek influence.

One of my reflections over the years is that effective campaigning needs both **knowledge and access**; knowledge of the issue and access to your target. In campaigns that I have been involved in, we have had knowledge of the issue but not always had access to the target. Therefore, we have had to think creatively about different routes to get such access.

So, whilst it can be easy sometimes to go out to recruit your natural allies and friends to act as messengers for your campaign, sometimes it can be even more powerful to think more tangentially about other organisations, **surprising allies**, whom people would not expect necessarily to speak out on your issue, that may carry more impact for you.

The influence tree can be **the roadmap for your campaign**. Never forget the direct route, but also be curious about who your potential messengers could be to convey your message to your target. As a campaigner you will need to harness both knowledge of your issue but also access to your target to be effective. Your challenge is how are you able to do both those things - the influence tree helps you to do just that.

Third campaigning tool: the Opposition matrix

When I was younger and got involved in campaigning, I had absolutely no interest in any opposition to my campaign because frankly I was right and they were wrong. But as I got older, I began to realise that, in campaigning terms, opposition arguments can be like gold dust for your campaign. They can help you understand why your campaign is not moving forward, and how you might need to modify your campaign to build broader support.

I have come to call this campaigning tool the opposition matrix. It is very simple: you take a blank sheet of paper and draw a line down the middle. On the left-hand side of the page, you list all of the possible arguments that you can think of against your campaign. And on the right hand side of the page, you list all of your arguments in support of your campaign. I also think this exercise is best done in a group and not by yourself!

Once you have completed this exercise, it is good just to sit back and take a look at what you've produced. You should ask yourself **to what extent are your arguments actually addressing your opponents' arguments?** When I have done this exercise on some of the campaigns that I've run, it has helped me to see that these two sets of arguments almost exist in two parallel universes. The challenge of this exercise is to reflect on all of the arguments at your disposal, and decide which will be the most effective in building support for your campaign.

I think as campaigners, and this was certainly the case for me, that we can be guilty sometimes of running only with the messages that motivate us. Yet campaigning is not about satisfying ourselves, it is surely about **building broader support**. I think this simple tool can be very useful in helping us as campaigners to begin to think more creatively about the best messages to build more momentum and interest in our issue.

I have also come to learn as a campaigner that you need to start a conversation with someone **where they are at, and not where you want them to be**, so that you can look to move them. I do increasingly see that your choice of **an entry point** in any conversation is absolutely critical in beginning to build some momentum and engagement when you are talking with someone new.

But we all have **choices as campaigners**. Do you just want to stick to the messages that you want to talk about or are you interested to use other messages to build broader support to increase the chance of change happening on your issue?

I hope that you will come to see the value of being curious about the opposition to your campaign and thinking creatively about the most effective campaign messages to respond to that opposition so that you can build more support for your issue. As a campaigner it is so important to reflect on what you feel are the best entry points in conversations about your campaign; conscious that this may not be where you yourself would prefer to start.

The wrap-around approach: the Future story

We have got to have, in my opinion, a future story for our campaign. It's the most important part of our journey on campaigning; the information in this section is what I would have loved to have heard in my early days campaigning!

Right from the start, I have always had a rough idea in my head of where I was going and how I could see change happening on my issue. But only I could see it!

Over the years I began to realise that this is such an important part of campaigning; some people might describe it as a theory of change, but I have increasingly preferred to talk about a future story for your campaign.

Your future story is your vision of how change is actually going to happen on your issue and what you are going to do to make that change happen. It contains the chain of events that you are going to make happen that will, in your opinion, bring about the change that you want to see. Conscious that none of us can predict the future, but

nevertheless it is still so important as a campaigner to be able to articulate how you see change happening on your issue.

Your future story will start off simple and very top line as you plot your overall direction, and then as your thinking and actions develop, your future story will become more detailed. But never forget that top line story – despite the need for detail – you will always need that crisp and inspiring future story!

I have referred many times above to the importance of having a clear message for your campaign; but that is not enough. I have come to realise that you also need a **robust story** of how you see your desired change actually happening. And it is not good enough, as I used to do, just to keep it in your head, you need to **write it down**, commit it to paper so that you can share and discuss with others.

And I do think in campaigning, it is so important to have a story that you can tell:

- *Where you have come from (the past)*
- *Where you are now (the present)*
- *Where you are going (the future)*

Campaigning is not about **telling** a story; it is about [actively making a story happen](#).

As you think about your **future story**, that will bring about change on your issue, make sure that it is robust, so go back to your discussions on your external environment - what were your conclusions? It is vital that your future story is grounded in your understanding of your external environment; if not, you run the risk of running a fantasy campaign.

In developing your future story, there are two little words in the English language that become so important to you as you seek to demonstrate how you can build momentum on your issue, and they are [so and that](#). For example:

- We are going to do some research
- **So that** we can brief politicians
- **So that** they can raise the issue
- **So that** we can get some media coverage
- **So that** the government responds

So that so that ... so that ...

I have found it can be helpful in developing your **future story** that you distinguish between those immediate small steps that you need to do to get moving, what you are going to do today, tomorrow and the day after. But you also need to be very conscious

of the bigger steps, the milestones along the way of your journey towards your ultimate goal, that you will look to reach as you develop your campaign.

But do remember this infamous quote from Helmut von Moltke:

[“No battle plan ever survives the first contact with the enemy”](#)

Now I am conscious that you may well not see your campaign as a battle, and that you may well not see your target as the enemy, but nevertheless there’s an inherent wisdom in this quote for anyone campaigning. You can develop your future story and begin to implement those small steps, but possibly in your first interaction in the outside world, you learn something that you had not appreciated before. You need to take this new piece of learning into account and discuss with your team whether you need to make any changes to your future story.

I’d like to suggest that every time you have engagement with the outside world, it can be really good practice just to take stock, review what you’ve learnt and discuss whether you do need to make any changes to your approach. [Here is an example from my own work.](#)

And [in writing it down](#), you can also then seek external ‘sense checks’. It can be really helpful on occasions to sit down with an ally or maybe a supportive politician, or a journalist and share your future story with them. It can be incredibly helpful to receive their challenging questions because they might come up with ideas and points that frankly you just had not thought of. It is helpful to recognise that your future story is based on your assumptions, so do be ready for them to be challenged by others and for you to see whether you are able to defend them.

In developing a future story, you need to have [these two qualities](#):

- **Confident** – in writing down your story. It does take some guts to commit your thinking to paper on how change will happen on your issue in the future.
- **Humble** – to invite challenge so you can test and strengthen your thinking.

I have found in the past when I have shared this campaigning tool with people, whilst they have appreciated the concept, they then struggled to understand how it could actually be implemented in a practice. For this reason, I developed a practical working example based upon my work supporting Roma communities in Bulgaria. [You can access this case study here.](#)

This future story will be the engine for your campaigning!

Conclusion

I do hope this pamphlet will help you in your campaigning, and that you might think about using an elevator pitch, an influence tree and an opposition matrix together with developing your own future story.

Remember to:

- Base your future story in your understanding of your external environment
- Be both confident and humble
- Keep your future story under regular review and be open to challenge
- And that no battle plan ever survives the first contact ...

Having done all of that and after beginning to engage with the outside world, it is so important that you and your colleagues meet on a regular basis to review your progress.

I'd like to suggest that the agenda for such a meeting would be relatively simple whereby you look at your future story, you assess what you've done, if you've been blocked, you think about why you've been blocked, if you've been successful you think about why. Then discuss whether you need to make any changes to your future story based on the reality of your external engagement.

If you'd like more detail on this approach supported by real life examples from around the world together with thoughts on how you can effectively plan for success, do take a look both at [my website](#) and [my book on campaigning](#).

Thanks for reading this pamphlet, and enjoy your campaigning!

Jonathan