Get Election Ready with Mobilize

Election 2024 is here! Maximize your Mobilize potential with our 2024 Readiness Checklist and discover in-demand features.

✅ 2024 Checklist

Settings Page

Review dashboard settings

- Organization mission
- Default contact email
- Legal disclaimer (if applicable)
- Branding, both logo and primary color
- Social Sharing
- Image, title, description, even a hashtag
- Facebook Pixel and Google Analytics

Double-check dashboard toggles

- Promotion by Mobilize and other organizations -- *15% of all Mobilize signups come from promotions!*
- Automated check-in for virtual events
- Automated Weekly Newsletter

VAN Settings

- Ensure the connected VAN API key will not expire mid-campaign
- Verify Activist Codes, Event Types, and Statuses in the integrated committee are configured accurately for Mobilize
- Map all Mobilize Event Types to the corresponding VAN Event Types that will be utilized throughout the election season using the **+ Add Event Type** button
- If syncing Promoted events, repeat the above instruction
- Confirm the Activist Codes and Survey Questions configuration in the corresponding dashboards and committees

Promotions

- o Double check the orgs you are promoting are still the orgs you want to be promoting during the 2024 electoral cycle
- o Check in on your "Filter promoted events" tab and make sure the filters you have set are going to be the right ones for the election ü Make sure you're being promoted by Mobilize (if you'd like to be)
- o If you find that you are not being promoted on mobilize.us and want to be, reach out to support@mobilize.us

Fundraising

- o Make sure your "post-signup donations" link is set up and up to date if you would like to make small donation asks of your supporters -- there have been over 11k post-signup donations averaging $30 per projected donation!

🔥 *Tip: If you enter an ActBlue page or an NGPVAN fundraising form, we'll try and use one-click FastAction or Express Donate where possible.*

🏆 Must Use Features:

Creating Events, Online Actions, and Groups

Scheduled events

The bread and butter of organizing – Mobilize Scheduled Events can be virtual, in-person, or hybrid. They can occur once or have multiple "shifts" or timeslots.

Anytime Actions

Anytime actions engage supporters on their own time, with meaningful action. These can be anything from advocacy-based emails or phone calls to sharing social media content, utilizing our URL redirect to share recorded content, driving engagement with external links (register to vote by mail!), and more! Configure Activist Codes for Anytime Actions to create lists for re-engagement and outreach.

Pledge and Interest Forms, Groups, and Petitions

Use these actions to list build, engage supporters with quick easy actions, grow volunteer groups, and more! Sync these to an activist code to easily segment lists in NGP VAN/ EveryAction

- Example: Create a group for "Whale Watching in Seattle", and configure it to apply the "Whale Lovers" activist code, or create a petition to "make streets more cyclist friendly," and apply the "road safety petition signer" activist code.

Tags

You can use Tags to specify information or themes about the Event or Action. This can help categorize the engagement opportunities on the organization's Event Feed!

Additional Fields

These customizable fields can be used to gather additional information from the supporter upon event signup. Fields that can be created are Checkbox, Dropdown, Short answer, and Long answer. These fields can be created by admins and used in the event creation process by admins and organizers. Checkbox Additional Fields can be synced to an Activist Code in VAN!

Recruiting and Promotion

Organization Event Feed

This is the central destination for an organization's events and actions, allowing supporters to easily discover actions. The event feed will surface events to the supporters that are in closest proximity first, followed by virtual events today and quick do-anytime actions, organizations can also highlight priority events which will appear at the top of the feed.

- Supporters can search and filter the feed to find events most relevant to them, based on type, location, and more.
- The Map feature also provides a geographical view of your feed or search. You can make use of URL parameters to create custom filtered feeds that you can send to your supporters (think of these like saved searches).
- For example, URL parameters can be used to: create a list of all events tagged "birds"; create a link showing all events within a 50-mile radius of a zip code; or create a saved search of events with ASL interpretation available, and more!
- By generating the URL parameters dynamically with your SMS or email tool, you can create personalized links for your supporters. § URL parameters also allow you to do sophisticated actions, such as pre-fill volunteer details on event sign-up page

Promotions

Promotions allow your events to appear on Mobilize.Us, let other organizations share your events with their supporters, and allow your organization to share events from like-minded partner organizations on your Mobilize feed.

- 15 % of signups across Mobilize have been driven by the Promotions feature.
- Sharing partner events is a great way to keep your supporters engaged without needing to organize an event (and you can always see which of your supporters have signed up for the events you promote).

Event Suggestions

Keep supporters engaged by utilizing Mobilize Event Suggestions! These can be customized if you have priority events, otherwise, Mobilize will suggest upcoming events to your supporters. These suggestions will occur immediately after the supporter signs up for an event, along with subsequent automated recruitment that Mobilize can send.

- 22% of all signups on Mobilize in the last year have come from Event Suggestions

Weekly Automated Newsletter

The Weekly Automated Newsletter is a fantastic way to automate event recruitment and engage supporters. Mobilize will automatically send a newsletter on behalf of your organization on Thursday afternoons. These newsletters are customizable,
which makes it a terrific way to keep supporters updated on upcoming events and actions.

- These are personalized to the supporter, automatically showing them events closest to them, and additional times of events they have signed up for in the past.

Bring-a-Friend

The "Bring a Friend" ask is a simple easy way to tap into supporters' social network. This is easily enabled in the event or action creation process and will appear post-signup and in other automated reminders and nudges.

- 14% of all signups on Mobilize in the last year have come from Event Suggestions

UTMs

UTM parameters can be used to track how and where supporters are engaging with the event feed or signup pages. This allows you to track how email recruitment vs social media recruitment performed.

Fundraising

Post-sign up Donation

The Mobilize post-signup donation ask is easy to configure from the Fundraising tab. Once this has been set up the donation ask can be turned on or off per event and will appear post signup as well as in other automated reminders and nudges.

🏁 Advanced Features

Event Campaigns

Event campaigns are a great way to empower supporters to become leaders in their communities by hosting their own events or actions and organizing their own groups.

It also gives admins the ability to templatize the event creation process (including the ability to preset event types, date-range, and tags), approve events before they're published, and generally have broad oversight over supporter-created events.

27% of all events and actions hosted on Mobilize have been volunteer-hosted, with 11% of all signups coming from volunteer-hosted events!

Co-ownership

Co-ownership allows two different organizations to edit and manage events as if they were both the owners. Co-owned events will appear on both co-owners' event feeds and both co-owners will have full visibility into the events' data. All event data will flow into any integrated CRMs for both co-owners (such as VAN/EveryAction).

This is an excellent feature to use when working closely on an event or multiple events with a partner organization, but it also works well for large organizations with multiple child dashboards.

EveryAction<>Mobilize Fundraising

Mobilize's EveryAction integration for fundraising allows organizations to host fundraising campaigns (for donation asks directly in the Mobilize action feed) and events (for donate-to-RSVP signups) on Mobilize, as well as peer-to-peer fundraising events and campaigns. These events and actions are powered by EveryAction's fundraising pages but managed through Mobilize.

This provides a unified experience for volunteers and donors as they can engage with all events, actions, and fundraising opportunities in one place - the organization's Mobilize action feed.

Zoom Integration

An organization can connect their Zoom license to their Mobilize dashboard to provide a seamless virtual supporter experience. The Zoom integration will automatically register supporters for Zoom meetings and webinars and Mobilize will send personalized Zoom links to supporters to ensure event details are kept secure.

Zapier integration

This integration lets you configure zaps from Mobilize to Zapier-compatible apps when one of the following triggers occurs:
- An event is created in Mobilize
- A signup is created in Mobilize
- A new volunteer is created in Mobilize.

This integration is in beta, and we would love your feedback!

Stay up-to-date by bookmarking the following resources:
- [What's New on Mobilize](#)
- [Mobilize Status Page](#)