

Advantage Introduction and Basic Tutorial

Version: 3.14.2019

Introduction

Advantage is a voter contact software that makes use of the whole suite of RNC data to guide block walkers. All contact is survey based and uses questions to keep track of both voters and volunteers. It is best used for block walking, and phone banks can be added for an additional charge. Most volunteers will only interact with the platform through the phone app, but that advantage of usability is only accomplished with a lot of front-end work by an admin user on the CRM desktop site.

Expectations

The State Party pays for and grants all requests for Advantage access for any Republican candidate for statewide office, U.S. Congress, State Legislature, and for general county party use. The process for setting up a new Advantage campaign and training new users can take the State Party a couple of days for each campaign. Considering the large size of the state, the State Party works diligently to fulfill all Advantage requests in a reasonable time.

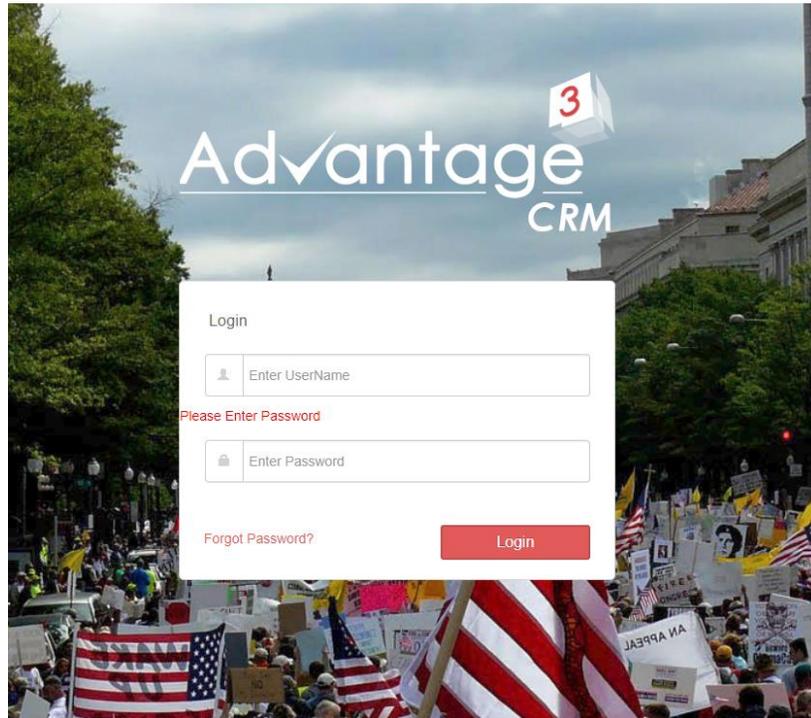
The Customer-relationship management (CRM) / Administrative System

Advantage can be accessed in two ways:

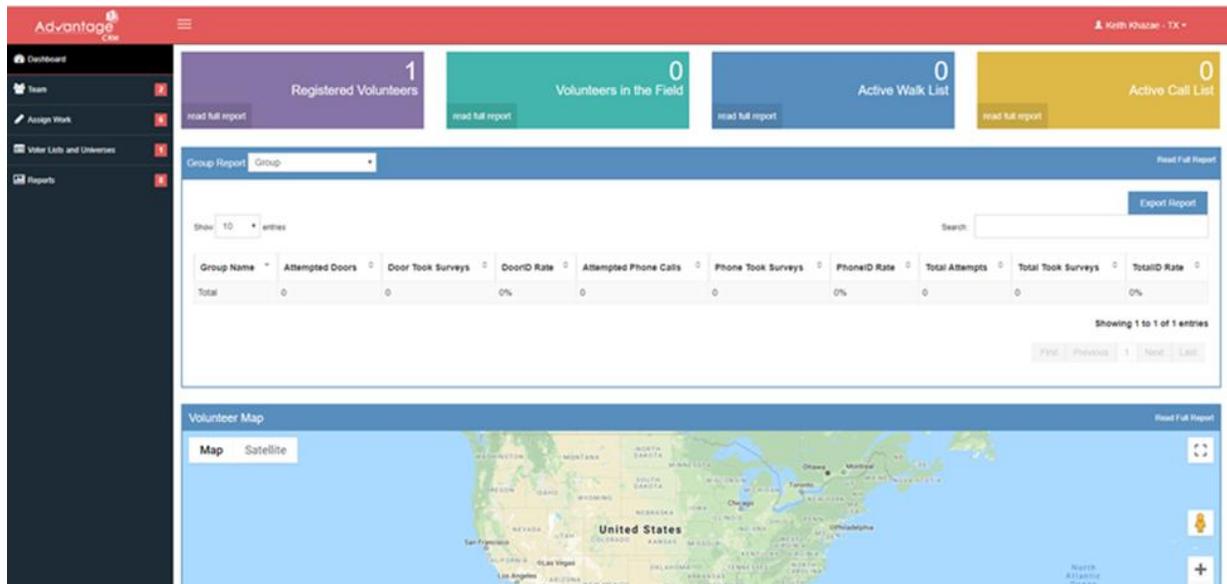
1. Desktop CRM
 - a. This is the site that you will access to do pretty much everything involving assigning work and measuring goals. It can be accessed at <https://crm.advantage.gop/>
2. Advantage Mobile
 - a. Available for iOS and Android, this is the walk app that volunteers will access. A volunteer's assigned walk books will show up as maps or lists.

Logging In to the CRM:

1. Go to: <https://crm.advantage.gop/>
2. Type in your username and password



Once logged in your screen will look like the picture below

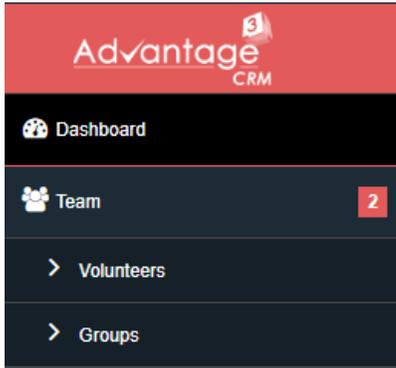


| Group Name | Attempted Doors | Door Took Surveys | DoorID Rate | Attempted Phone Calls | Phone Took Surveys | PhoneID Rate | Total Attempts | Total Took Surveys | TotalID Rate |
|------------|-----------------|-------------------|-------------|-----------------------|--------------------|--------------|----------------|--------------------|--------------|
| Total | 0 | 0 | 0% | 0 | 0 | 0% | 0 | 0 | 0% |

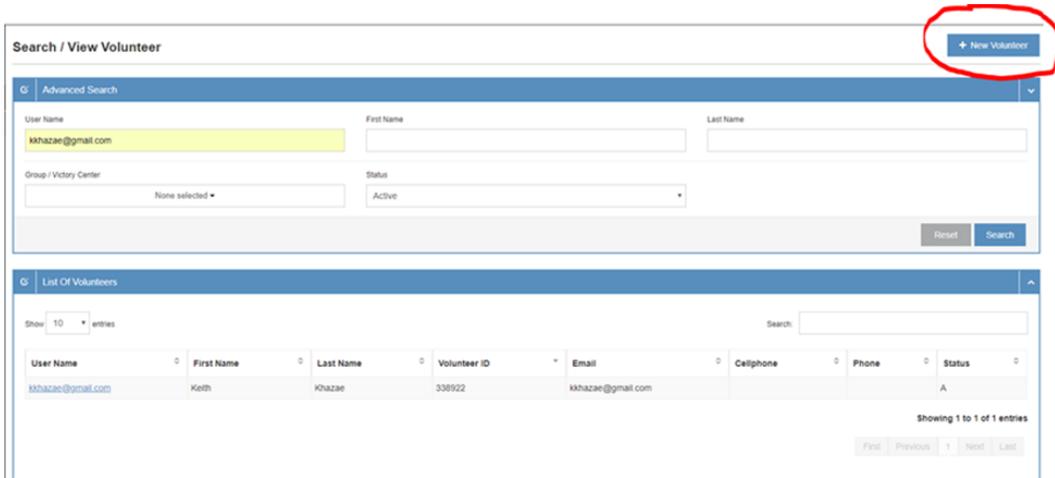
Setting Up User Accounts

Every user should have their own credentials. Individual credentials allow for tracking of individual canvassing and calling activities. All volunteer accounts are usually created by local points of contact for Advantage, which can include but is not limited to: county party staff, campaign admins, and RPT staffers. Most users will receive an Access Level of 1, which allows them to view and use walk books.

1. From the home screen, click **“Team”** and then **“Volunteers”**



2. Click **“+ New Volunteer”** in the top right corner

A screenshot of the 'Search / View Volunteer' screen. The top right corner features a blue button with a white plus sign and the text '+ New Volunteer', which is circled in red. Below the button is an 'Advanced Search' section with fields for 'User Name' (containing 'khhazae@gmail.com'), 'First Name', and 'Last Name'. There are also dropdown menus for 'Group / Victory Center' (set to 'None selected') and 'Status' (set to 'Active'). 'Reset' and 'Search' buttons are at the bottom right of the search section. Below the search section is a 'List Of Volunteers' section with a table. The table has columns for 'User Name', 'First Name', 'Last Name', 'Volunteer ID', 'Email', 'Cellphone', 'Phone', and 'Status'. One entry is visible: 'khhazae@gmail.com', 'Keith', 'Khazae', '338922', 'khhazae@gmail.com', and 'A'. The table shows 'Showing 1 to 1 of 1 entries' and navigation buttons for 'First', 'Previous', '1', 'Next', and 'Last'.

3. On the Create Volunteer screen, fill in the form as noted
 - a. Password must contain a minimum of 8 characters. Enter only letters and numbers for password and at least one character should be capital
 - b. User Levels
 - i. 1 = Volunteer (No access to CRM. Can only create walk books in-app for themselves)
 - ii. 2 = Group Leaders (CRM access. Create walk books for group. Create new users with level 1 or 2 access)
 - c. Assign user to your Group/Victory Center

Surveys are a key ingredient to the Advantage systems.

Not much happens without them! Surveys provide the ability to connect canvassing lists to volunteers and monitor the results of your voter contact activities. Surveys can be used as both scripts and questionnaires that capture data for voter ID, or on attitudes and preference. When assigning walk or call lists, the system requires the assignment of a survey. Use surveys for special events, fundraisers or ad hoc campaigning (in "Campaign" Mode). The survey connects the walk/call list to the volunteer –all the data gathered is tied back to the voter. Surveys also allow you to monitor volunteer activities.

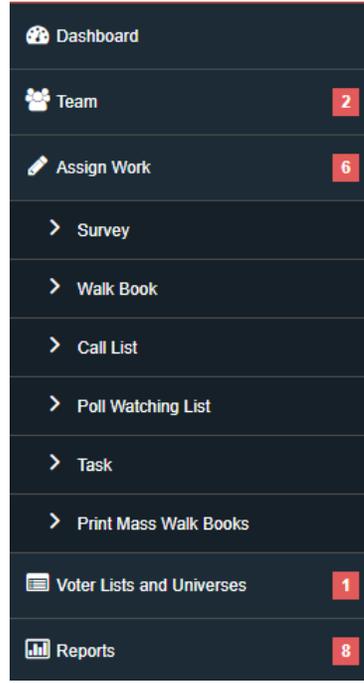
There are no general surveys, so each campaign will need the state party to create one for them. Creating surveys can be a time-consuming process but typically will only need to be done once.

Step-by-Step:

1. Sketch out what questions you are going to ask and how you will phrase them
 - a. Keep them short and general. The survey should not be your script, but rather a summary of what you are trying to find out.
 - b. This should reflect what you have identified as the most important tactics to winning your campaign. If it is an issue-based campaign, then gather feedback on where the electorate stands. If it's a turnout campaign, design some simple questions that remind the voter when, what, where, and how to vote.
 - c. The typical survey could look something like the following:
 - i. [Intro] Hi, I'm _____ with _____ and I'm out here today talking to people about our upcoming elections. (Candidate) is running for (position) and has a record of (background info, messaging, candidate policies, issues, etc.)
 - ii. [ID Question] Can (candidate) count on your support for (position)?
 1. Yes
 2. No
 3. Unsure
 - iii. [Issue Question] Do you support (issue)? –OR– What is your top issue?
 1. Yes/Issue 1
 2. No/Issue 2
 3. Unsure/Issue 3
 4. Other
 - iv. [Yard Sign] Would you be interested in a yard sign showing your support for (candidate)?
 1. Yes
 2. No
 - v. [Contact info/volunteer recruitment] Would you be willing to provide your email/phone number to receive periodic messages from the campaign regarding issues that concern you? –OR– Would you be interested in volunteering for the campaign?
 1. Email/Yes
 2. Phone/No
 3. Unsure

Creating Walk Books

1. From the home screen click **“Assign Work”** and select **“Walk book”**

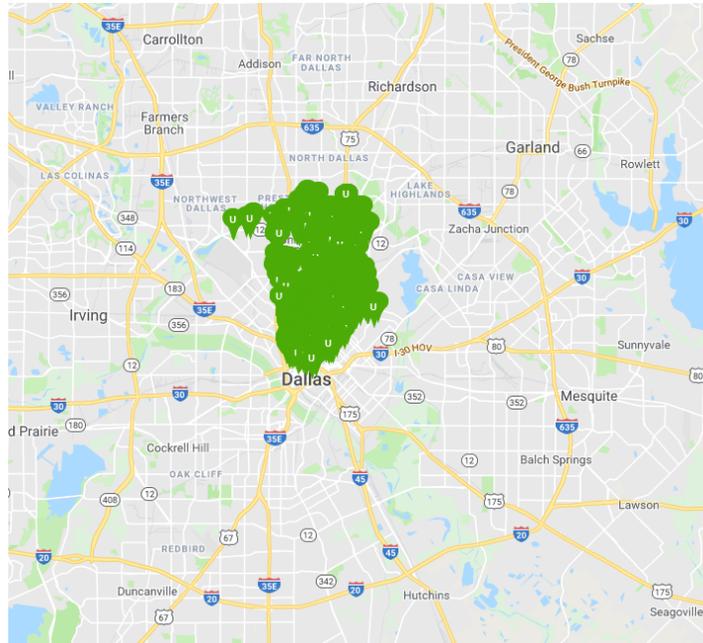


2. On the next page click **“+ New Walk Book”** in the top right corner

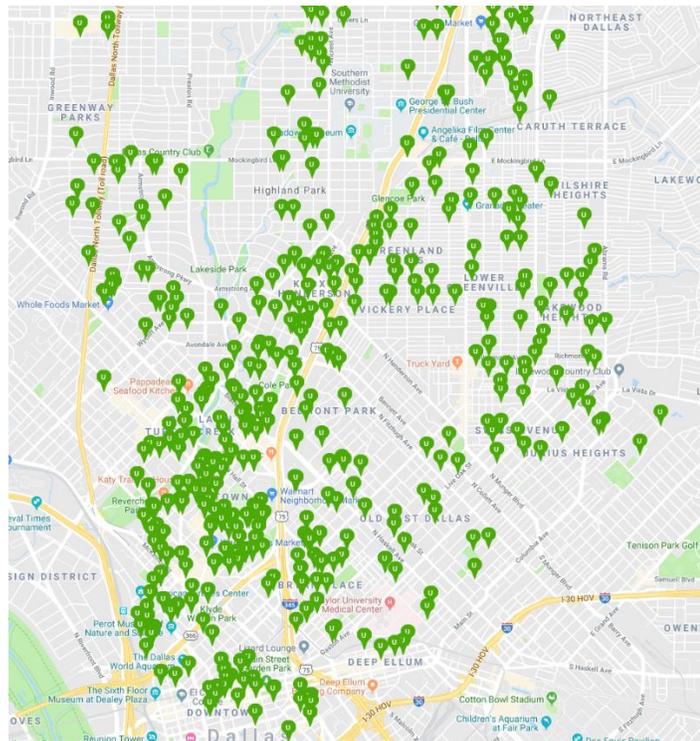
A screenshot of a web application interface. At the top, there is a header bar with the text 'Search / View Walk Book'. In the top right corner of this bar, there are two buttons: '+ New Walk Book' and '+ Update Mass Walk Book'. The '+ New Walk Book' button is circled in red. Below the header is a search form with a blue header 'Advanced Search'. The form contains several input fields: 'Walk Book Name' (text input), 'Survey Name' (dropdown menu with 'None selected'), 'Jurisdiction Name' (dropdown menu with 'Select Juris'), 'Precinct Name' (dropdown menu with 'None selected'), 'Volunteers' (dropdown menu with 'None selected'), 'Group / Victory Center' (dropdown menu with 'None selected'), 'Start Date' (text input with 'MM/DD/YY' placeholder), 'End Date' (text input with 'MM/DD/YY' placeholder), and 'Active/In-Active' (dropdown menu with 'Active'). At the bottom right of the form are 'Search' and 'Reset' buttons.

3. Select your survey, jurisdiction (county), and desired precincts
 - ****NOTE**** Under the survey dropdown menu is a clickable link titled **“Assign Walk Universe”**. Click that link, and under the **“Universe Tag”** dropdown menu, select your assigned universe.
 - It is recommended to select a maximum of 3 precincts at a time when creating a walk book to maintain a good user experience

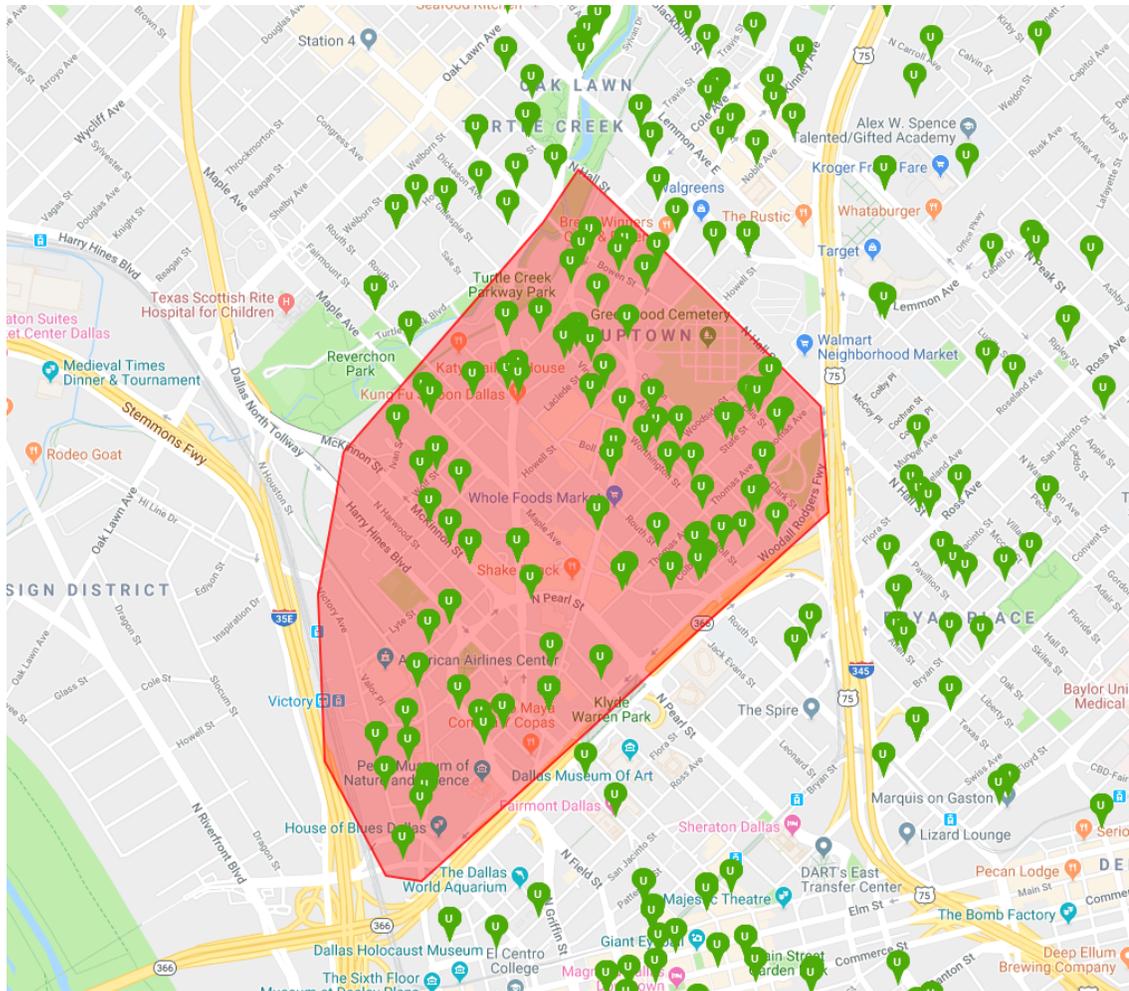
- Once you have your desired parameters set, click **“Show Map”**
 - **Note**** If the system times out on you, you will need to select a smaller geography.
 - The first view on the map will be a high-level look. All the map points in your selected precinct(s) should look well organized/clumped together as shown here:



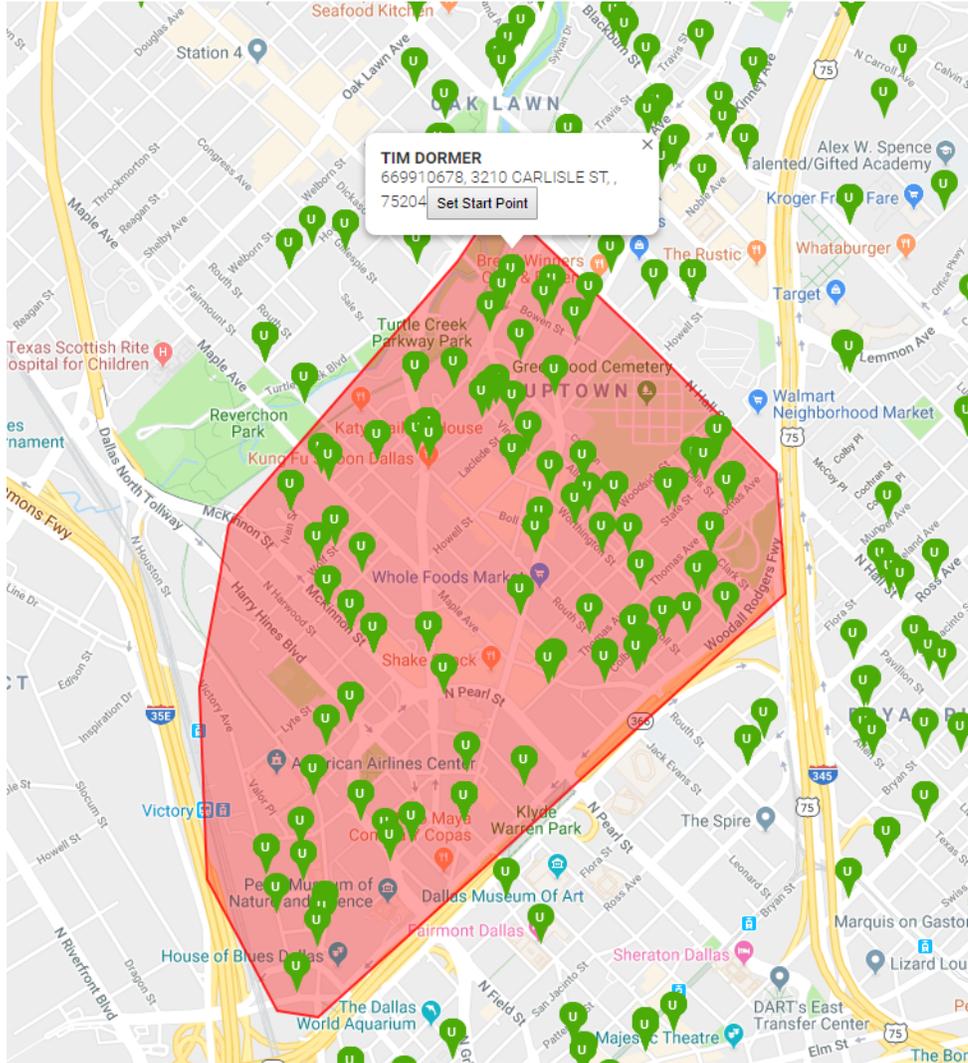
- Zoom in to get a better view of the area



- Use your mouse to click around the map to select your walk area. On the first click, you will “drop” a flag on the map. Once you’ve selected the area you want, click on the flag to complete the selection. Once completed, it should look like this:

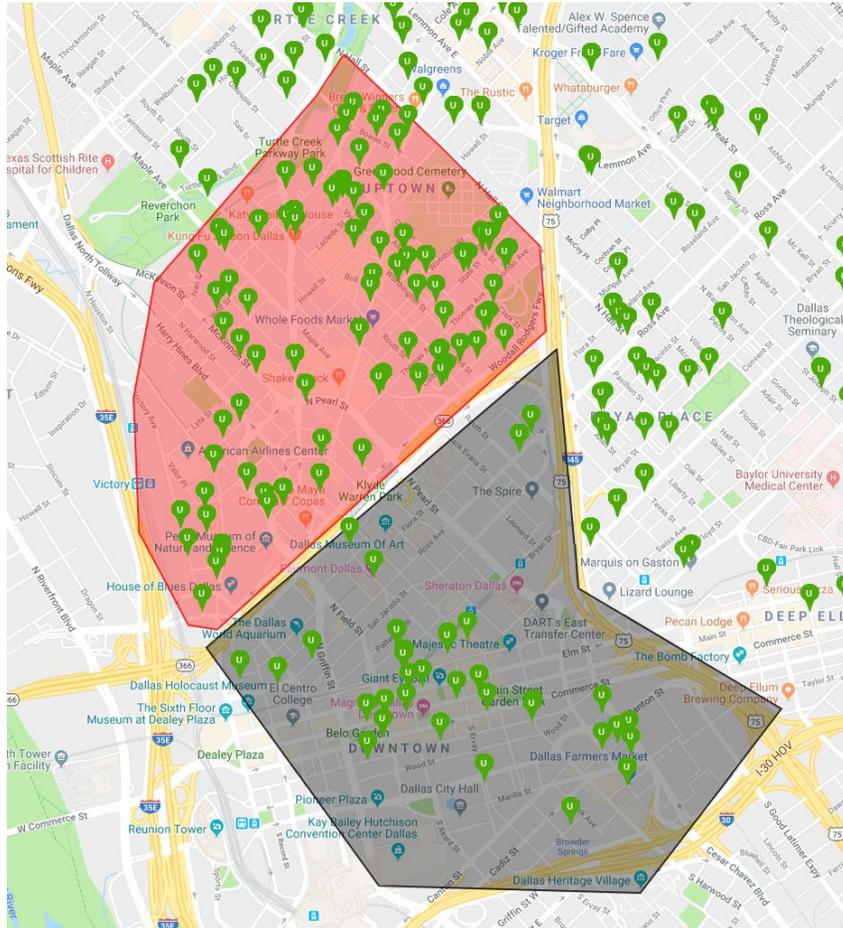


7. Click on any of the pins in your selected area, and click “Set Start Point”

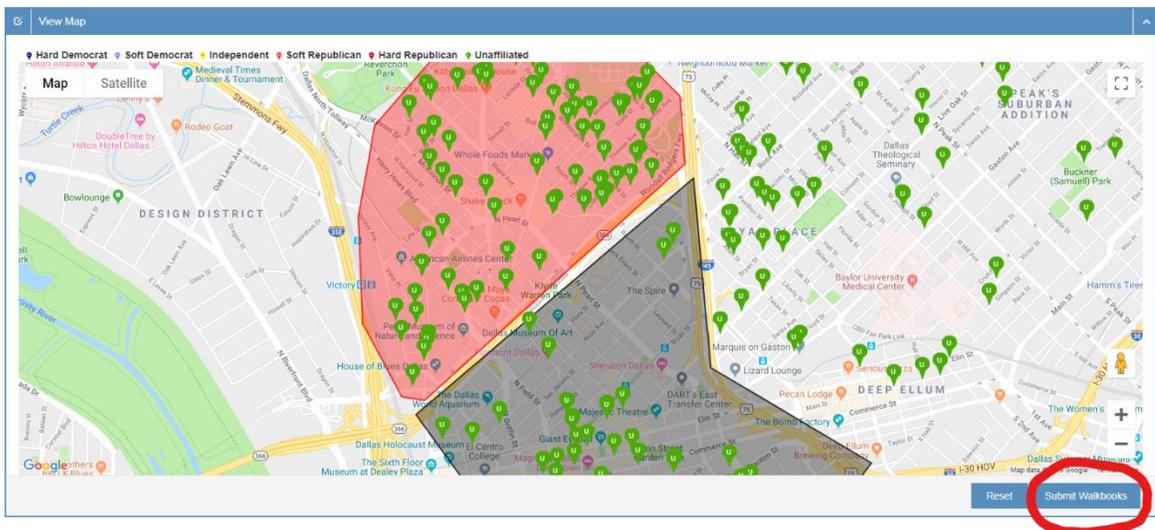


8. A window will open titled at the top “Name Your Walk Book”
 - o This will show you the number of houses and voters in the walk book
9. Name your walk books in an organized manner will help reduce issues (e.g. “Precinct#_Book1”, “HouseDistrict#_Precinct_VolunteerName”, etc.)
10. Select the volunteer(s) or group to assign the walk book to
 - o If you assign the walk book to your group, EVERY volunteer in your group will be able to see/access the walk book
 - o If you assign the walk book to one or more individuals, ONLY those selected individuals will be able to see/access the walk book
11. Click “Continue”

12. You can continue to cut multiple walk books if you'd like. Just be sure to adhere to an organized naming system for your walk books



13. Once you have completed your desired number of walk books, click **“Submit Walkbooks”** in the bottom right corner

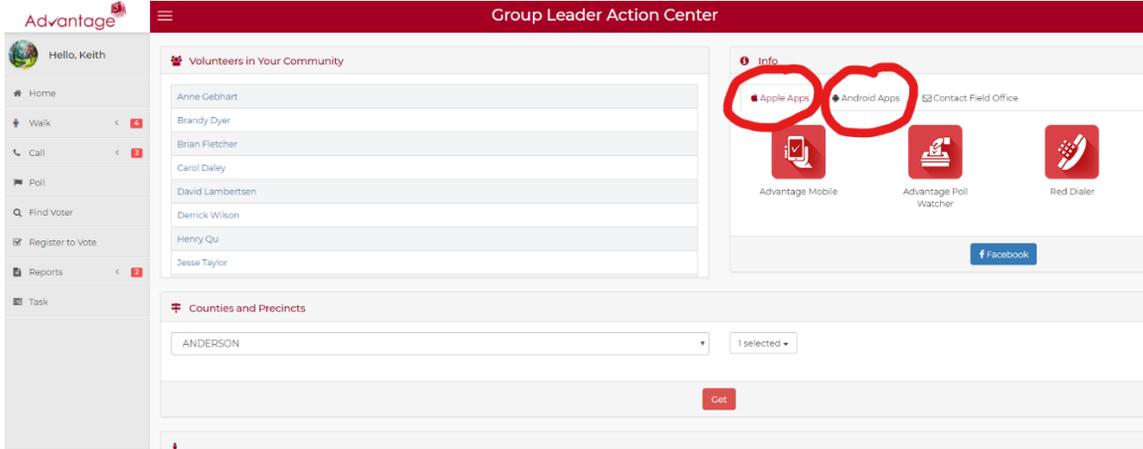


Downloading the Mobile App

1. The app is available as a free download from the iOS App Store and Android app stores under the name “Advantage Mobile”

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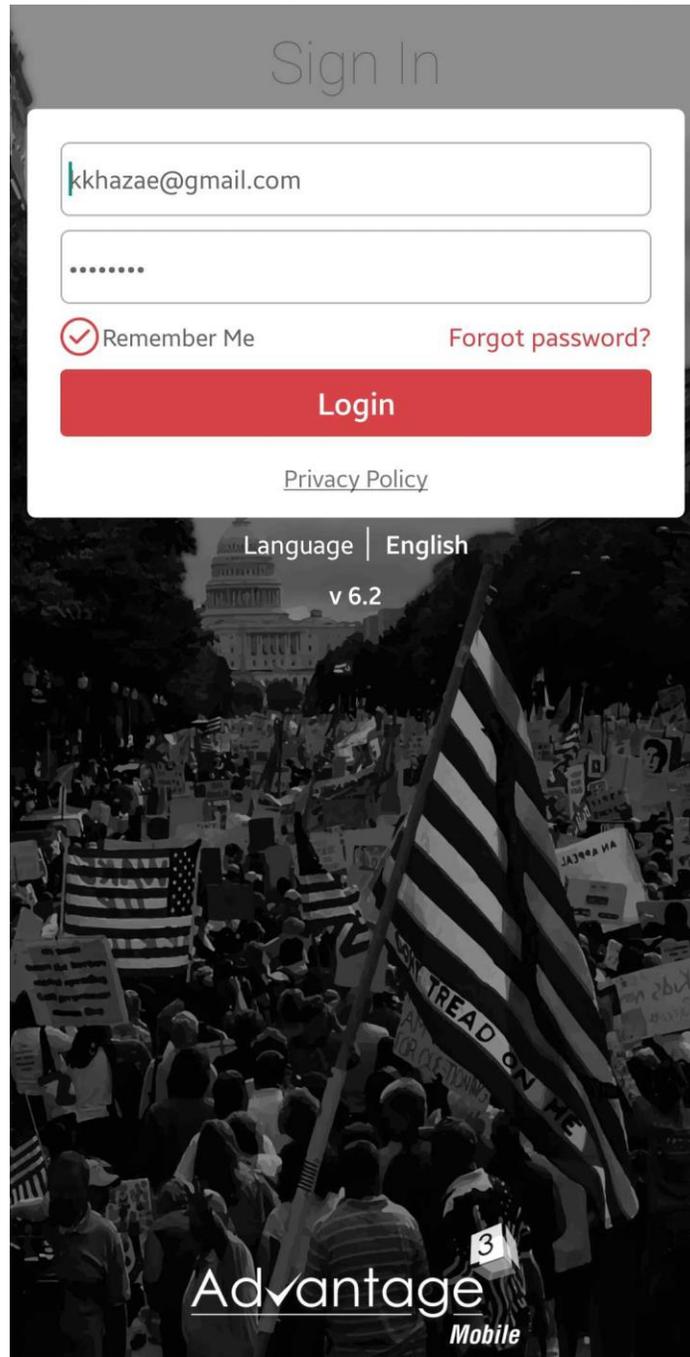
2. Go to: www.advantage.gop. Links to the mobile app downloads are on the home page



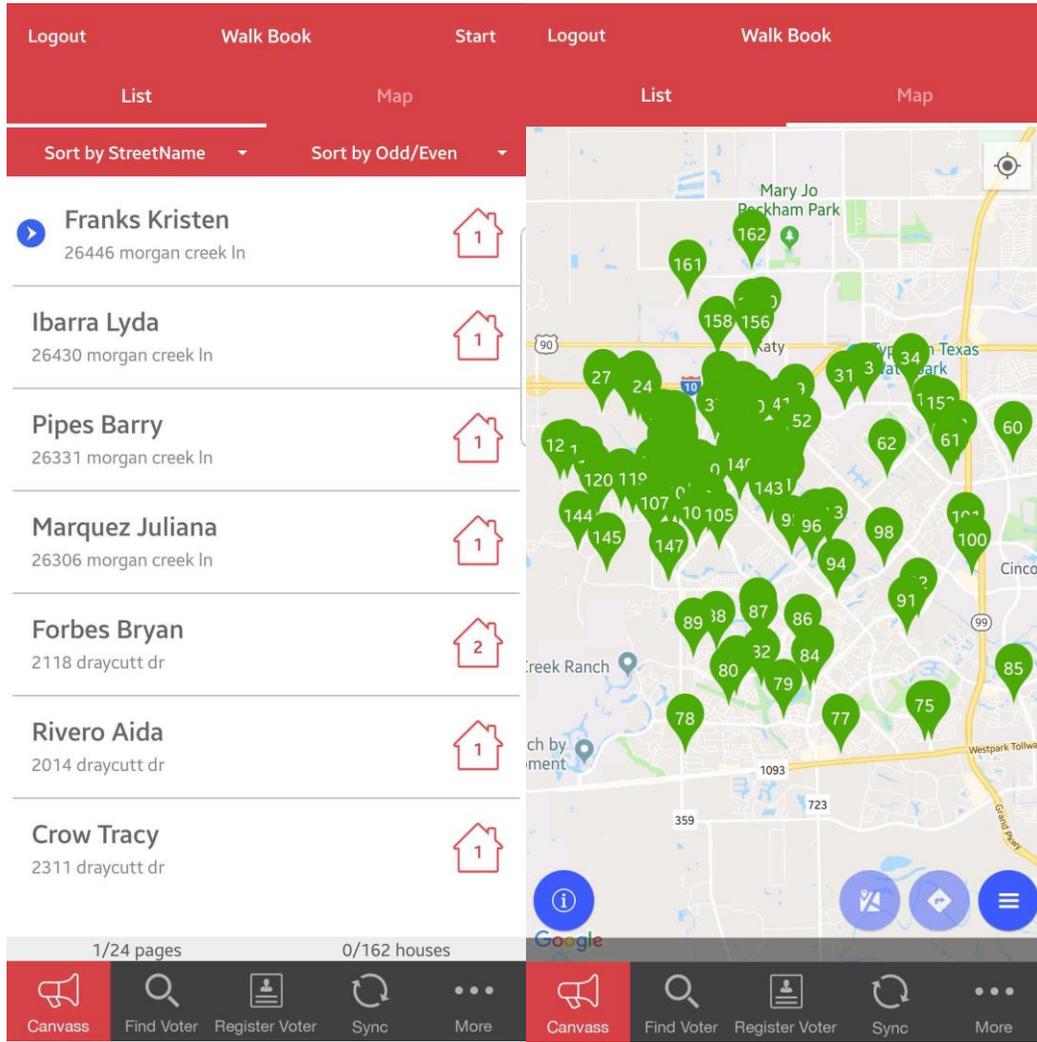
Mobile App: Getting Started

The usability for a volunteer is very friendly. The basic process is as follows: your Advantage point of contact will create for you an account and walk books. You will complete those walk books, sync the app, and you are done! The important steps in this for you are summarized here:

1. Log into the app using the credentials given to you by your Advantage point of contact



- Select the walk book for the day. Click on **“Start”** in the top-right corner and then **“Assigned Walk Book”** in the popup. Select the walk book assigned to you and it will load. The assigned voters will appear as a list in walking order or as a map.



- Navigate to the first door and select the action. The actions appear when you select on a voter’s name. They include: No Answer at Door, Door Answered Refused Survey, Take Survey, Deceased, Moved, Gated Community. Follow the prompts depending on the appropriate selection. If a voter answers the door, select their name from the list of household members and Take Survey. Select all of their answers.

4. Routinely sync the data every few houses. You can do this quickly at the **“Sync”** button at the bottom of the screen. When there are no more houses to be synced, your screen will look like the following:

