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PowerBase Webinar: Using Campaigns & Surveys



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CAMPAIGN

Phone
calls

Meetings

Event
participation

contributions

memberships

Responses
to surveys

Activities



CiviCampaign lets you link together different activities under one "umbrella" so that you can track the progress of all your efforts towards one programmatic goal or campaign.

Campaigns allow you to:

- connect related activities
- create surveys for use with walklists and phonebanking
- create online petitions (aka online survey)
- Review responses from surveys and petitions

Preparing to use Campaigns in PowerBase

- **Know your audience** and choose your strategies and methods of communications appropriately
- **Plan the activities** you will use in PowerBase
- **Plan how you will gather data**, e.g. surveys, phonebanks, events registrations
- **Know how to create the searches or reports** you need to analyze your efforts

Setting up Campaigns

- Enable CiviCampaign and set drupal permissions
- Create your Campaign types
- Create your group or smart group of your target audience
- Create a New Campaign

...Create your activities and connect to your campaign

...Search various activities and contacts connected to your campaign

Setting up Surveys

- Create your group or smart group of your target audience
- Create your custom field set of questions and responses (**Used for** Activities with type Survey, or WalkList, or PhoneBank)
- Create your profile that includes the questions for your survey
- Create a New survey

Survey Tips:

#1

If you plan on conducting many surveys throughout the year (let's say 20 - 30 surveys in a year) with only a few questions per survey (let's say 3-4 questions per survey), then we strongly suggest that you create ONE custom data set that includes all the questions for each of the survey. Then you can create individual custom profiles for each survey that pull in the questions that are particular to that survey.

#2

If you plan on conducting just a few surveys per year (let's say about 3-4 surveys per year) with the number of questions no more than 10 per survey, then we suggest that you create different custom data sets for each group of questions per survey. Then you can use custom profiles to pull in in the questions that are particular to a survey.

Conduct your Surveys

- Reserve your Respondents
- Interview your Respondents – record responses
- Use the Survey Report to print walklists and phonebank lists, and to view/export/print response results

Setting up Petitions

- Ensure drupal petitions are set properly for anonymous users and authenticated users can sign petitions, access custom data, and access profiles
- Create 2 custom profiles
 - ✓ Contact profile – minimally with email address, verification for signature
 - ✓ Petition questions profile – custom field set of questions and responses for petition

Conduct your Petition

- Create a new Petition and include the profiles you created
- Publicize the link to your petition
- You can view the signatures of the contacts who responded to your petition
- Use Activity Report to view/export/print the response results of your petition

Confirmation of signature needed for Safe Public Housing Petition



X

Inbox

X



★ **FIXME** info@fixme.org to me

[show details](#) 2:09 AM (8 hours ago)

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Thank you for signing Safe Public Housing Petition.

In order to **complete your signature**, we must confirm your e-mail.

Please do so by visiting the following web page by clicking on the link below or pasting the link into your browser.

Email confirmation page: <https://sandbox.ourpowerbase.net/civicism/petition/confirm?reset=1&cid=2584&sid=1&h=c50c2130c44248b9&a=3461&p=4>

If you did not sign this petition, please ignore this message.

Thank you for signing Safe Public Housing Petition

Inbox | X



★ **FIXME** info@fixme.org to me

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Thank you for signing Safe Public Housing Petition.

Help spread the word about our petition

Please help us and let your friends, colleagues and followers know about our campaign.

Do you use Facebook or Twitter ?

Share it on Facebook or tweet it on Twitter.



Do you have a website for your organisation or yourself?

You can write a story about it - don't forget to add the link to <https://sandbox.ourpowerbase.net/civicrm/petition/sign?sid=4>.

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Questions?



Recording of this webinar will be posted on <http://network.progressivetech.org>
In 24 hours

Thank You!

Stay with us for Office Hours
with Josue Guillen