

SPEAK4_

Get An “A” In Advocacy: Grassroots 101



You're never too big for the basics.

Whether it's your first time running an advocacy campaign or you're a seasoned grassroots guru, the basics of advocacy are too important to ignore.

To help you ensure the foundation of your advocacy funnel is airtight, we've distilled our Grassroots Summer School webinar series into three core lessons: Advocacy Basics, Tech Stack Facts and Advocacy Dos & Don'ts.

Read on to see if your advocacy efforts are worthy of an A+ or need a little extra tutoring.

LESSON 1 Advocacy Basics

LESSON 2 Tech Stack Facts

LESSON 3 Advocacy Do's and Don'ts



LESSON 1: Advocacy Basics

What Is Grassroots Advocacy?

Grassroots advocacy is powered by people speaking up – calling lawmakers, sending letters, showing up at hearings – and pushing for change on issues that are important to them.

As Speak4 CEO Joe Mansour put it: “Grassroots advocacy is when ordinary people mobilize to influence public policy or government decisions – typically by contacting elected officials, participating in campaigns, or raising public awareness on issues that directly affect their communities.”

Advocacy has layers, and each plays a role in moving policy.

Grassroots: broad public pressure: constituents calling, writing, showing up.

Grasstops: high-leverage voices: influencers, business leaders, respected allies.

Lobbying: professional advocates engaging directly with policymakers and staff.

The strongest campaigns use all three: public momentum, influential messengers, and direct policy engagement working together.

LESSON 1: ADVOCACY BASICS



Who Should Be Doing Grassroots Advocacy?

Short answer: everyone.

Advocacy isn't just for political organizations and trade associations – non-traditional groups such as chambers of commerce, cities and counties, local homeowner associations and corporations are increasingly engaging in advocacy.

If you've got members, employees, customers, or a mission, you've got a reason to advocate.

How Do You Launch a Grassroots Campaign?

1. Set Goals That Matter

Once you identify the policy or issue you want to influence, you need to make sure your advocacy goals align with your organization's priorities. What does leadership care about? What keeps your board, customers, or employees up at night?

And remember: not all advocacy is legislative. Campaigns might target regulatory agencies, planning commissions, or even university administrators. If you can influence a decision that impacts your mission, it belongs on the advocacy map.

2. Understand the Basic Legislative Process

Understanding the basic legislative process will help you identify the right moments to engage. Learn the rhythm and be able to answer questions like: Who's the bill sponsor? What committee does it need to clear? When are the hearings and markups? What's the path to passage?

Pro tip: Watch for blind spots. One ally doesn't guarantee smooth sailing. Instead of aiming for a narrow win, build enough support to withstand surprises.

3. Target the Right People

Campaign goals determine the target. Bigger fights (like federal issues) demand broader, surround-sound tactics; local campaigns may only need a few key voices.

WHO matters:



Champions
already with you, keep
them close.

Persuadables
where the game is won. Focus
your energy here.

Opposition
unlikely to move, don't
over-invest.

4. Craft a Message That Sticks

A strong message is like a house: one big idea, supported by foundation of clear arguments and upheld by the right messengers. A personal story from a constituent often lands harder than a policy memo.

Avoid: Skipping bill numbers, sending essays, or blasting one-size-fits-all messages.

Do: Keep it short with one clear ask, show local impact, and use diverse messengers. Match your tone to the moment – are you launching a proactive campaign to build support early, or a reactive campaign to mobilize quickly?

5. Deploy with Simplicity

Advocacy campaigns boil down to three things: message, vehicle, distribution.

The golden rule? Make it easy for people to take action.

As Tyler Hargrave, Vice President of Partnerships at Speak4 emphasized:

“Give advocates a one-click path. The more seamless it is, the more likely they are to take multiple actions.”

6. Engage and Re-Engage

Don't let supporters be one-and-done. Chain actions together:

A PETITION → A SURVEY → A CALL → A HEARING

Keep the momentum rolling – and don't underestimate the basics. Surveys, phone calls, even one-on-one outreach can turn casual digital advocates into reliable champions who show up in person.

7. Measure and Learn

Passing or stopping legislation is the ultimate goal, but you still need supporting metrics:

- Number of advocates recruited
- Conversion rates on landing pages
- Contacts made to lawmakers
- Advocate Lifetime Value (how much action one supporter takes over time)
- Video testimonials collected

Tear down your wins and losses. Run after-action reports. And remember — digital tactics evolve. What worked five years ago may not work now.

The Bottom Line

Grassroots advocacy works when you plan, target and act with purpose. Clear goals, sharp messages and the right messengers turn voices into impact. Do it right, and you move policy – and make a real difference.



LESSON 2: Tech Stack Facts

Your strategy is only as strong as the tools behind it. A clunky, disconnected, or overwhelming tech stack slows you down — a well-aligned tech stack powers efficiency, impact, and smarter decisions.

Why Your Advocacy Tech Stack Matters

A strong advocacy tech stack matters because it allows organizations to be more strategic, efficient, and impactful. Advocacy moves quickly — lawmakers expect timely, coordinated outreach, and supporters expect simple, intuitive ways to take action.

When tools are connected and working together, organizations can launch campaigns faster, track engagement more effectively, and clearly show the impact of their work. Strong technology gives advocacy teams the power to focus on strategy and relationships, rather than being bogged down by manual processes.



Common Pain Points in Tech Stacks

Fragmentation:

Tools don't 'talk' to each other, creating data silos.

Underutilization:

Tools bought but not actually used.

Complexity:

Tech stacks that are too burdensome for lean teams.

Advocacy teams juggle numerous tools like CRMs, donor systems, email, and action platforms. If your tech stack isn't aligned with your organization's resources and larger goals, it can cause your team to spend unnecessary time and money.

A wise warning from Speak4's Partner Success expert, Cassie McPhail:

"If the stack feels too complex, it can become a burden instead of a benefit."

The Advocacy Funnel Framework

The Advocacy Funnel provides a clear roadmap for recruiting, engaging and mobilizing supporters over time. Once you understand this flow, you can structure your tech stack around it.

The goal of the funnel isn't a simple one-time action — it's to move people from first-time participants to repeat action-takers who share their stories, show up and influence decision-makers across multiple channels. At Speak4, we refer to this as an Advocate Lifetime Value approach: maximizing the number of actions an advocate takes over the course of their lifetime.

Each stage of the funnel represents a deeper level of commitment, requiring different engagement tactics and tools to strengthen your base and maximize impact when it matters most.

RECRUIT

At the top of the funnel, your goal is reach – casting a wide net to acquire new supporters you'll activate over time. Use tactics like social ads, social toolkits, email blasts to existing lists and more. Your advocacy tool should integrate with these outreach efforts to capture supporter information and grow your list effectively.



NURTURE

Once you've collected advocate information in the Recruit phase, focus on building relationships and sustaining engagement – even when your issue isn't on the ballot. Move advocates down the funnel with subsequent, higher quality asks that deepen involvement and prime them for future action. Examples could be asking advocates to “send another letter” or sign petitions, complete surveys or record personalized video testimonials.



ACTIVATE

With an engaged supporter base in place, you can review data to identify your champions – advocates who consistently take action. These individuals can be mobilized for key moments when your campaign needs quantity (like a high-volume letter send) and/or quality activations (trusted voices who will share their story publicly, attend meetings and mobilize others).

What Makes a Strong Advocacy Tool?

Key qualities to look for in advocacy tools:



Seamless integration

Works smoothly with CRM, email, website, advertising, and text platforms.



Actionable reporting

Delivers data you can use to improve strategy, not just track activity.



Goal alignment

Capabilities should support your overall advocacy plan, not just offer isolated features.



Ease-of-use

Intuitive and simple to adopt for your team.

LESSON 3: Advocacy Dos & Don'ts

We met with legislative staffers to find out what advocacy organizations should do to actually get noticed – and what to stop wasting time on.

Here's what we learned:

The Value of Local & Multi-Level Advocacy

Advocacy is strongest when it's layered. Federal issues might grab headlines, but the real leverage often comes closer to home. Local and state advocacy can hit harder, simply because lawmakers and their staff aren't buried under the same avalanche of messages.

As Brandon Moore, Legislative Director in the Texas House of Representatives put it:

“As you get more local, a lot of these tactics become more effective, because they're just simply not used to the volume, they don't have the staff.”

Translation? Don't overlook your city council or state rep. A single well-organized grassroots push at the local level can have more impact than a national campaign with thousands of voices shouting into the void.

Creating “Surround Sound” Influence

One email won't cut it. One phone call won't cut it. And one Facebook post? Definitely won't cut it.

Real influence happens when advocates create surround-sound, coordinated, multi-channel touchpoints that keep an issue impossible to ignore.

That means emails and calls, in-person visits and social posts, coalition letters and local media hits. Advocacy is about repetition, consistency, and reach. If your campaign can't be heard from multiple directions, don't be surprised when it fades into the background.

The Role of Social Media

Social media isn't the silver bullet some advocates think it is — but when it's used strategically, it can crack through the noise.

As our capitol insider explained:

“It'll vary member by member, but a lot of times, we actually see things on X, Facebook or Reddit that we didn't see elsewhere.”

What Staff Value Most in Advocates

Here's the truth: staffers are slammed. They're juggling committee meetings, constituent calls, drafting policy briefs, putting out political fires, and more.

If you want their attention, you need to make their lives easier — not harder. That starts with being clear about who you are and why you're reaching out. Brandon broke it down simply:

“If you're going to contact your representative, no matter who it is or what level, make sure you provide your name and address so they know that you're actually a constituent in that district. A phone number and email are always helpful as well. This helps us track what constituents are saying.”

And when it comes to substance? Brandon's advice:

“If I had one theme for today, it's that providing clear, concise, factual information that gives members knowledge that they don't already have about an issue is one of the most beneficial things you can do.”

LESSON 3: ADVOCACY DOS & DON'TS

Advocacy Pitfalls to Avoid

Now let's talk about what kills credibility:

- ✗ **Bullying staff or lawmakers.** Don't do it. It doesn't work, and it can backfire badly. As Brandon warned: "Don't be a bully, because you might be bullying the wrong person... They either won't tolerate it, or they might know more than you think they do."
- ✗ **Overloading staff with noise.** Sending 10 follow-up emails in a week isn't persistence – it's spam.
- ✗ **Ignoring local voices.** National form emails can be useful in scale, but if you're not elevating authentic constituent stories, you're missing the point.
- ✗ **Relying only on social media.** It's one channel, not the whole playbook.

Advocacy works when it's thoughtful, respectful, and relentless in the right ways. Anything else is wasted effort.

Dos

Keep information clear, concise, and factual.

Share your message across multiple channels ("surround sound").

Engage at all levels of government, especially local.

Use social media strategically to reach lawmakers and staff.

Respect staff time and treat them professionally.

Don'ts

Don't overwhelm staff with long or complicated talking points.

Don't rely on just one channel to get your point across.

Don't assume only federal lawmakers matter.

Don't assume social media alone will influence decisions.

Don't use aggressive or bullying tactics.





Closing Thoughts

Advocacy is about building influence, not burning bridges. Local and personalized action matters. Surround sound matters. Caring counts. When you follow the dos and avoid the don'ts, your campaigns will start standing out for the right reasons.

Looking for a better way to mobilize supporters quickly and get your message in front of lawmakers? [Get in touch with Speak4](#) and we'll show you how we help our partners drive results where they matter most.

