

# Managing and Engaging your Coalition List Coalition Building Tips Sheet

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## Why Lists

- Your list is your access to PEOPLE – to build your coalition you want to add new people to your list and deepen your relationship with others already on your list.
- Lists should collect relevant information, track how people interact with your coalition (what actions they take) and be regularly updated.

## Managing your List

1. Collect all your lists, and identify one place to keep them electronically – either in Google Docs, Microsoft Access, Excel or Constant Contact.

2. Tips for list formatting

- Make sure every field is titled, and that they are uniform (don't put a phone number in the email field). If you don't have a field for someone, leave it blank.
- Create a source field that tags where you got this person's name (i.e., signed up online, ABC Project, etc.), to assure that you will be able to search for just the people you want.
- Include area code and make sure you use “-” instead of “( )” in the phone number field.
- Use separate fields for first and last name. The same applies for addresses. Have one field for street address, another for city, a third for state and a final field for zip code.
- You will have to distinguish between a home address and a work address. Please make a field for each and place the address accordingly.

3. Populate your list

- Make sure the list is current. Use the most up-to-date information and delete people and information that you know to be out-of-date.
- Get current addresses and phone numbers for your lists by sending an email to everyone you have an address requesting up-to-date information.
- Create a process for getting information when people come to your office or events.

4. Manage your list

- Assign one person to the task of managing your list. If that is not possible, have one person come up with guidelines and make sure a limited number of people are well-trained and follow the established guidelines.
- When you use sign-up forms, including on-line registration forms make sure that the forms ask for the same data your list does. This way, you can add people to your master list without the burden of matching up columns or moving things around.

## Engaging Your Coalition List

### 1. Keep building your list

- Add new people that you talk to or get sign-up sheets from your general list.
- Cross post your materials, events, media, etc. to various social media platforms.
- Ask your coalition's top spokespersons or influencers to personally reach out to their networks to spread the word about your coalition.
- Do list swaps with other similar or related organizations.
- Research and reach out to other online communities, groups, or platforms with audiences who might be interested in your organization (just as you do with partnership development off-line).

### 2. Communicate with your list

- Ideally everyone on your list will get an email from you at least 1 to 2 times a month.
- Make sure these emails are engaging and that they are opportunities to collect input and feedback from the people on your list who make up your coalition's network.

### 3. Segment your list

- You should have one overall list. To increase engagement, you should also create segmented lists so that you are communicating appropriately.
- Before you segment, think about what kind of time and capacity you have to create different messages for each of these groups.
- To begin, try creating three lists: one for coalition partners, one for core supporters (your active, engaged members) and one for other supporters (those individuals who have signed up for information or those who volunteer less frequently).
- Customize your content and messages accordingly. For example:
  - You might send your coalition partners frequent informal emails, as well as talk to them by phone regularly.
  - You might send your core supporters your monthly newsletter, one additional email per month and a personal phone call every other month.
  - You might send your other supporters your monthly newsletter, a yearly survey to see what they are most interested in and an additional quarterly email that asks them to like you on Facebook, to attend an event or to submit a story.

### 4. Refine your list and use it to track activity

- Move people into segmented lists accordingly. As they show more interest and become more active, you may want to add them to your supporter list, your core supporter list or your partner list.
- A good list will show you what is and isn't working in your coalition building activities.