

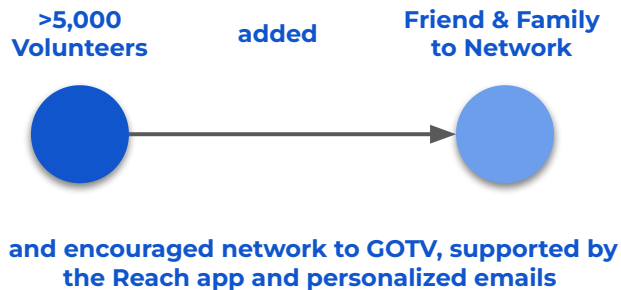
# Scaling Personalized Volunteer Emails

A light-weight, large-scale approach with BigQuery, dbt, Census, and MailChimp

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# Two Million Texans organized the **largest-ever, all-volunteer relational organizing network** during the 2022 midterms



## ✓ Benefits

Contacts more apt to listen to people they know  
Self-selecting volunteers are genuine, passionate

## ✗ Challenges

Volunteers may be less experienced with GOTV  
Need to optimize limited volunteer bandwidth

## ? Key Questions

How to give every volunteer the context to succeed  
Balancing *scale* and a *highly personal* experience

# We drove volunteer engagement through an **daily email campaign** with bite-sized progress reports and nudges for actionable next steps

## Status Update

Hi Cynthia,

Thank you for being part of the Two Million Texans GOTV ("Get Out The Vote") campaign to turn out the most voters in Texas, EVER. We have become the largest GOTV network in Texas history. We have enough voters to match the percentage Beto lost the entire state by in 2018.

Your network is unique to you and only YOU can turn out your own friends and neighbors. Of the 116 potential voters in your network, 67 of them can ONLY be reached by you. So far, 84 in your network have voted, and we want to get 100% of our networks out to the polls.

Looking for ideas of where to get started?

## Call-to-Action

In a few minutes **TODAY**, you could start contacting these Democrats in your network who haven't voted yet:



## Downballot Talking Points

### Conversation Starter: District Attorney

District attorneys are the top prosecutors in their counties and are responsible for deciding when to bring charges under state law. At their best, they provide an important safeguard against abusive application of laws passed by our legislature.

If you know voters who have high profile DA races on their ballot, we've listed a few below. Regardless, all voters can support the cause of just application of the law in the statewide Attorney General race.

- ██████████ (Hays County DA)
- ██████████ (Bexar County DA)
- ██████████ (Bexar County DA)
- ██████████ (Hidalgo County DA)

This email campaign was orchestrated by integrations throughout our campaign's modern data stack



# dbt handled all data processing, to centralize business logic and circumvent limitations in MailChimp templates

1

Used filter to remove volunteers with no more outstanding voters

3

Formatted and split contact lists to avoid MailChimp character limit

first_name	n_gotv	netw_status	list_gotv_1	list_gotv_2	email_address	updated_at	...
Snow	7	Of the 100 potential voters in your network, 98 of them can ONLY be reached by you. So far, 93 in your network have voted	Sleepy Dopey Grumpy Happy Bashful 	Doc Sneezy 	snow@white.com	2022-11-01	

2

Processed summary text for convenient merging

4

Update date field so existing audience members had journey triggered

5

Similar fields for voters in specific down-ballot races to trigger Talking Points block

Table updated daily, but historical recommendations were logged with dbt snapshot  
(Details in Appendix)

# Census moved the data from BigQuery to a MailChimp audience

## Sync Trigger

[Schedule](#) dbt Cloud API Sequence

Not Scheduled



## Data Configuration

[Edit](#)

### Specific Properties

Specify exactly which columns apply to the destination.

Identifier Email\_Address = Email Address

### Mappings

First_Name	→ Set	Merge Field: First Name
Last_name	→ Set	Merge Field: Last Name
list_gotv_part1	→ Set	Merge Field: LST_GOTV
list_gotv_part2	→ Set	Merge Field: LST_GOTV2

# MailChimp Journeys allow trigger-based emails that can be customized by an email template with merge fields

The screenshot shows the MailChimp Journey editor for a campaign titled "Daily 2MT Email" with an audience of "Two Million Texans". The journey is currently "Paused". On the left sidebar, there are options to "Hide", "Edit Settings", and "View Data". The main workflow area shows a sequence of steps: a trigger "Contact is added on the day of SEND\_DT", a "Filters" step, an email step "Send email Daily 2MT Email" (highlighted with a blue arrow), and finally "Contact exits".

The screenshot displays the email content, which is personalized with merge fields. The text includes a greeting "Hi \*[FNAME]\*", a thank-you message for being part of the "Two Million Texans GOTV ('Get Out The Vote') campaign", and a call to action: "Your network is unique to you and only YOU can turn out your own friends and neighbors. \*[IMMERGE5]\*, and we want to get 100% of our networks out to the polls." Below this, there is a question "Looking for ideas of where to get started?" followed by a dark grey box containing a tip: "In a few minutes TODAY, you could start contacting these Democrats in your network who haven't voted yet:" followed by two merge fields: \*[IMMERGE6]\* and \*[IMMERGE9]\*. The email concludes with "Want to keep going? Find all your connections who haven't voted in the Reach app!" and a note: "New on 11/4: You can now find other high-impact contacts by filtering on the 'Reachable Only by You' tag".

Down-ballot talking points were served to relevant volunteers using the Dynamic Content feature

*(Details in Appendix)*

This email campaign was orchestrated by integrations throughout our campaign's modern data stack





# Questions?

↓ **Get in touch** ↓

@emilyriederer on [Web](#) | [Twitter](#) | [GitHub](#) | [LinkedIn](#) | Gmail

↓ **Check out these resources** ↓

[dbt Snapshots](#)

[Census - Mailchimp Integration](#)

[MailChimp Journeys](#)

[MailChimp Merge Tags](#)

[MailChimp Dynamic Content](#)

↓ **Find more details in the Appendix** ↓

# Appendix

# dbt Snapshots preserve history of email recommendations to support future analysis

Snapshots implement type 2 slowly changing dimensions (SCD) with a number of useful metadata fields:

first_name	n_gotv	...	dbt_scd_id	dbt_updated_at	dbt_valid_from	dbt_valid_to
Snow	7		<<Unique key for each snapshot record>>	<<When record was inserted; used by dbt>>	<<When record was first written to the table>> ★ Date content appeared in the volunteer's email ★	<<When record was invalidated/overwritten in the table>>



first_name	n_gotv	...	dbt_scd_id	dbt_updated_at	dbt_valid_from	dbt_valid_to
Snow	7		sd3852sjfs	2022-10-28	2022-10-28	2022-10-29
Snow	6		4859sd20nsjf0	2022-10-29	2022-10-29	NULL

dbt Snapshots are created with a pseudo-model that are only executed when the `dbt snapshot` command is run to avoid writes on dev runs

📁 `tmt_dbt/snapshots/email_snapshots.sql`

```
{% snapshot emails_snapshot %}
```

```
{{
```

```
  config(
```

```
    target_database='two-million-texans',
```

```
    target_schema='snapshots',
```

```
    unique_key='user_id',
```

```
    strategy='timestamp',
```

```
    updated_at='updated_at',
```

```
  )
```

```
}}
```

```
select *
```

```
from {{ ref('user_emails') }}
```

```
{% endsnapshot %}
```

} How to detect changes

} Where to check for changes

# MailChimp's Dynamic Content allowed us to create Talking Points only for volunteers who were connected to voters with relevant races

The image shows a MailChimp editor interface with three main components:

- Preview (Top Left):** A dark grey box containing the text: "In a few minutes **TODAY**, you could start contacting these Democrats in your network who haven't voted yet:" followed by two merge tags: `*[MMERGE6]*` and `*[MMERGE9]*`.
- Preview (Bottom Left):** A blue box titled "Conversation Starter: Local Judges". It contains the text: "Courts can take away our rights -- or they can stand up to protect them. County judges are the first line of defense in our legal system. In 2018, Harris County made news by electing a slate of reform-focused judges and with the help of your network we can return and expand such presence across the state." followed by: "If you know voters who have county criminal court races on their ballot, we've listed a few below. Regardless, all voters can make their voices heard in Appellate and Supreme Court elections this November." and a merge tag: `*[MMERGE11]*`.
- Editor (Right):** The "Boxed Text" editor interface. The "Settings" tab is active, and the "Set Dynamic Content" button is highlighted with a blue box. A blue arrow points from this button to a configuration dialog box.

**Dynamic Content Configuration Dialog:**

Let's set your Dynamic Content condition

Only recipients who meet the condition you set below will see this content.

`N_HD` is not `0`

Buttons: Confirm, Reset