

Inside the Obama Machine

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It is important that it be understood from the outset that in any other election Barack Obama would have lost. Here was a junior, unknown politician running against the best established, most powerful, and well-financed Democratic machine in modern history – the Clinton family. So how did a man just four years removed from the Illinois State Senate catapult himself to the White House in a landslide victory in which he defeated two of the best-known brands in politics, Hillary Clinton and John McCain? How did he pull off a staggering margin of nearly 200 electoral votes and 8.5 million popular votes and win nine states George W. Bush took in 2004?

The simple answer is that Barack Obama understood that since the last open presidential election in 2000, the technological revolution that has changed every aspect of American life had fundamentally realigned the power dynamic in politics as well. So while Hillary Clinton and John McCain set out to run the previous campaign all over again, Obama forged ahead and ran the first campaign of the twenty-first century.

The Online/Offline Campaign

To say that Obama won because of the Internet would be oversimplifying. It's more accurate to say that he couldn't have won without the Internet. »In my search for the ›killer app,‹ or evidence of how technology was used in groundbreaking new ways, I've come to realize that what really happened with Obama is far more complicated and nuanced,« explains Michael Silberman, who headed Howard Dean's online organizing efforts in 2004 and now is managing director of the Washington office of Internet strategy firm EchoDitto. »The game-changer in the Obama campaign, as I found in talking to key staff – and in volunteering myself – was that technology and the internet was not an add-on for them. It was a carefully considered element of almost every critical campaign function.«

In many ways, Obama's campaign is like the band that took 10 years to become an overnight sensation. Personally he's been honing the ethos of organizing and community building since he started in the 1980s as a \$1,000-a-month community organizer with the Developing Communities Project on Chicago's South Side. As he said in one 1995 article at the beginning of his run for the State Senate in Illinois, »In America, we have this strong bias toward individual action. You know, we idolize the John Wayne hero who comes in to correct things with both guns blazing. But individual actions, individual dreams, are not sufficient. We must unite in collective action, build collective institutions and organizations.«

When I first sat down with US Senator Barack Obama to talk about running for President in fall 2006 – about four months before he announced he would enter the race – it was already clear where he saw himself. We sat in his Senate office, under a wall decorated with photos of Martin Luther King, Jr., Abraham Lincoln, Mahatma Gandhi, Nelson Mandela, Thurgood Marshall, and John F. Kennedy, all men called forth at great historical moments to head a movement and be the standard bearer for a generation's ideals. I asked him whether he thought he was in a similar moment and time. »I'm not a political mechanic,« he said, but »in terms of big picture and instincts as to what's important to the country and what's important to people, I think my instincts are good.« So was this his time? He smiled: »I agree with the saying that timing is everything, but I believe that whether you have a good sense of timing is largely determined retrospectively.«

It turned out that his timing was perfect – a new world was forming, and technologies such as YouTube, Facebook, and text messaging that barely existed just four years ago had matured to become a part of everyday life. From the first moments of Barack Obama's campaign in January 2007, he claimed the mantle of standard-bearer of a movement and the campaign's bottom-up, revolutionary style contrasted strongly with the more traditional campaigns of Hillary Clinton or John McCain. A funny thing happened once Obama entered the race, however: a movement emerged.

»Message, Money, and Mobilization«

The sheer scale of his presidential campaign dwarfed everything that had come before it: the campaign amassed some three million individual con-

tributors – millions more than George W. Bush garnered as the sitting president in 2004; Obama's Facebook page had more than 3,000,000 friends – six times more than John McCain; there were more than 100,000 supporter-organized events across the country and the campaign's e-mail list surged to over 13 million, larger than the combined lists of MoveOn.org, John Kerry, and the Democratic Party. The size of his fundraising effort was so unprecedented that by the final weeks of the campaign he was buying 30-minute blocks of national network TV time and advertising in Xbox video games.

His successful model focused on the three »m's«: message, money, and mobilization, each begetting the next in a cycle that powered the campaign to defeat all comers. »Barack had to be a different kind of candidate. If he ran as a traditional candidate, he wasn't going to be successful,« explains deputy campaign manager Steve Hildebrand, a 22-year veteran campaign organizer. As Gina Cooper, one of the grassroots activists who came out of the Dean 2004 campaign, explains, »Barack Obama's campaign is about rewriting the social contract between citizens and government.«

While the media and pundits swoon at how unexpected his success has been, the campaign never had any doubt: from their first days building his website and the tools of organization, they aimed big to ensure it could scale appropriately as the campaign grew. Much effort was put in early on to determine the right toolset, streamline and minimize the number of databases, and ensure integration up and down the campaign hierarchy. Thought was put in from the very start to ensure that the campaign and the Internet were fully integrated. This resulted in a sophisticated setup in which, instead of existing in its own silo in the campaign hierarchy, the new media team simultaneously was a part of the fundraising, field, and communications apparatus. Obama blurred the traditional definitions of the three skills in ways no candidate had ever done before.

One of the things Obama recognized early on was that online efforts cannot be done on the cheap anymore – the days of the candidate's geeky nephew as webmaster are long gone. In fact, one of the first signs of Obama's ambition was that he hired Jim Brayton as his US Senate webmaster; Brayton had been the webmaster of Howard Dean's 2004 campaign and was experienced with massive databases, lists, and websites far larger than that of a normal freshman senator. For the presidential campaign, Obama turned to Joe Rospars, another 2004 Dean veteran, now

with the firm Blue State Digital, which provided much of the backbone of the campaign's tech infrastructure; his head of online organizing was Chris Hughes, co-founder, with Mark Zuckerberg, of Facebook.com, and he hired executives from tech companies such as Upcoming.org and Orbitz as well. All told, Obama's online staff numbered close to 90 by the end, and Obama for America spent millions of dollars on servers, e-mail systems, development, and text messaging. Initial development alone ran to nearly two million US-dollars in 2007, which would have seemed absurdly high to most candidates. Obama's team understood the importance of building to scale, however. One problem the campaign set out to tackle immediately was integrating a single database as the backend of all the various tools, something never before done successfully in a presidential campaign. The single core database, which stretched to terabytes of data, helped power and enable cross-platform integration never seen before.

The genius of the Obama campaign didn't lie in its toolkit, though. The software, organizing tools, e-mail and SMS capabilities, voter files, and credit card processing system were all available – or at least similar variants were – to any candidate in this cycle. Online tools today are commodities. It's how the campaign used and thought about the tools that set it apart.

Even today on most campaigns – and, for that matter, in most business situations – senior staff are wary of the Internet's Wild West nature, and especially wary of the openness necessary to run a successful online venture. The McCain campaign and the Clinton campaign both experienced regular friction between their online staffs and more traditional senior staff. Not so Obama. Staff from the campaign manager right down to staff field organizers instead considered the Internet and technology as critical to everything they did. That recognition – of top-to-bottom integration and philosophical buy-in – was what proved so transformative. »If we don't do this right, shame on us. We're never going to have an opportunity like this again,« Hildebrand says. »We can't be just so single-minded that this is about Barack Obama. It's about a movement that changes the way we do business at every level.« Even the candidate himself was a techie: Obama cherishes his BlackBerry so much that as president he has fought to keep it, and on the campaign trail he regularly zoned out with his iPod. No previous presidential candidate has had his grasp of new technology – a fact that helps to explain the campaign's success.

Grassroots Narratives

Understanding the importance of message amidst the larger campaign, Joe Rospars, the campaign's online director, recruited journalists to build the narrative of a grassroots movement. It was important, Rospars says, that his bloggers and online media team had a sense of story-telling and narrative. So Sam Graham-Felson, formerly of *The Nation*, became the campaign's lead blogger, and Kate Albright-Hana, formerly a documentarian for CNN, became one of the lead video gurus. The campaign explained that its heavy online posting schedule and the narrative it developed through roughly 20 posts a day on the blog turned out to be an unexpectedly valuable field-organizing tool, since people in the field used the stories of supporters on the blog to connect with undecided voters. »These numbers are just unimaginable but we tried to take a magnifying glass and make sure that the individuals don't get lost,« says Graham-Felson, who traveled the country for almost two years collecting stories and interviewing supporters. When campaign manager David Plouffe had something to say, he flipped open his Apple MacBook and recorded short web videos to broadcast to supporters, updating them on the campaign efforts.

The campaign's narrative efforts – and the tools they used – were unprecedented. All told, the campaign created nearly 2,000 YouTube videos, which in turn were watched for around 14.6 million hours, according to a study by TubeMogul. The multitude of videos, Graham-Felson explains, were part of a broad microtargeting effort whereby each video hoped to speak to a particular group of voters or supporters. Those video efforts paid off in a big way: TubeMogul estimated that Obama received the equivalent of some 45 million US-dollars in »free« TV airtime from people watching videos on YouTube. One of the surprising lessons from the campaign, Rospars and Graham-Felson say, was that people wanted longer cuts. »In the beginning we were just posting clips, but people kept commenting they wanted the whole thing,« Rospars says. The campaign's most successful video – his 37-minute speech on race in Philadelphia in March 2008 – was watched by around eight million people online, far more than saw it live on television.

Public Relations

Beyond message, though, mobilization and money came into play. The campaign carefully used tiered ladders of engagement to encourage supporters to take on more responsibility or donate more. The campaign's toolkit, my.BarackObama.com – known as »MyBO« inside the campaign – featured a wealth of organizing tools not generally available in previous campaigns even to paid staff, let alone to any self-motivated supporter. By campaign's end, some two million people had set up accounts on MyBO, which allowed them to blog on the site, as well as providing features that let supporters generate lists of uncommitted voters to call from home and create canvas lists to knock on doors, as well as generate their own fundraising goals among their friends and family. Such information had never been made so publicly accessible by a campaign before; the campaign realized that the value it gained in distributing normally closely-held voter contact information far and wide more than outweighed any traditional tendency to protect the »crown jewels.« Concerning MyBO, Chris Hughes draws an important distinction: »We really think of this as an organizing network, not as a social network. If they want to contribute to a blog or a group listserv, that's great, but that's not what we're building this towards.«

Anyone who organized a house party for Obama got a phone call from an Obama organizer and anyone in a battleground state got a face-to-face meeting with an organizer before the event to talk about language, to hand over supplies, and generally to make that supporter feel intimately connected to the campaign. Rather than organize by precinct, as most campaigns do, the campaign staff relied on »Obama teams,« grouping precincts together to build small groups who worked together online and offline to activate social networks, organize house parties, and reach undecided voters across a small area. »Online volunteer organizing essentially built the campaign a structure in places where it didn't exist, letting paid staff parachute in and immediately take command of a working political army,« explains Colin Delaney of Epolitics.com.

In South Carolina, where Obama blew away Hillary Clinton – even her state campaign chair Don Fowler admitted Obama had organized the state like never before – the effort involved more than 10,000 volunteers who made at least three contacts with every African-American voter in the state. The neighbor-to-neighbor outreach, driven by MyBO, explains Jeremy Bird, the organizer for the state, was unprecedented: »No

campaign I've ever been on has been able to do that.« »We were told over and over that South Carolina isn't a field state. Every state is a field state if you do it right,« Bird says. Nationally more than 10,000 people applied to be one of 3,000 Obama Organizing Fellows, who were to be given three days of training and then turned loose in a community. The Fellows in Atlanta managed to register 1,200 new voters in a single day. The data from each of these efforts fed back up through the campaign databases all the way to organizers like Bird and campaign leaders like Plouffe, who had access to sophisticated dashboards to track activity. Organizers like Bird could have automated activity reports sent right to their BlackBerrys, which helped ensure that comments from grassroots activists got read by campaign leaders. »The Obama campaign made the greatest investment in this civic structure,« says organizing guru Marshall Ganz, who worked with the Obama campaign. »An enormous investment was made there.« As he says, »It's very important to distinguish between carpenters and tools. The investment in this campaign of creating skilled carpenters was what enabled them to use the tools as well as they did.«

On its way to an earth-shaking 500 million US-dollar online haul, the campaign had great success »matching« donations – people will sign up to donate, say, 25 US-dollars only if someone else will donate the same amount. The challenge ran successfully hundreds of thousands of times and created friendships among supporters across the country. And while most of the campaign's online money came from small donations, the campaign saw a not insignificant number of donors max out with 2,300 US-dollar donations online, in some cases even coming to the site through Google Ads. In fact, Obama's campaign, more than any previous campaign, relied on the power of Google. Obama advertised heavily in Google's contextual search – spending tens of thousands of dollars a month – to drive people to his website, to sign up for his e-mail list, and to create events. All of the campaign's online advertising was focused specifically on getting people to sign up for the e-mail list rather than garnering immediate donations, figuring that having an e-mail address is vastly more valuable than a single donation. With websites such as Fight-TheSmears.org, an official site that aggregated dozens of scurrilous rumors and attacks on Obama, the campaign sought to use the power of »Search Engine Optimization« (SEO) to make its own site appear at the top of results for people searching with questions about whether Barack Obama was a Muslim.

The campaign also worked hard to reach people using their technology of choice. Scott Goodstein, who in 2004 worked on a grassroots movement called PunkVoter, came to head the campaign's text messaging efforts as the campaign recognized that for people under the age of 30, SMS was just as important as e-mail or phone calls. Throughout the campaign, text messages were used to announce key speeches and television appearances, or to let supporters know about events in the area. In its biggest effort, the campaign encouraged supporters to sign up for text messages to be the first to hear about Obama's vice presidential selection – an effort that, campaign insiders admit, was more about collecting cell phone numbers to call or text on election day as part of »Get Out the Vote« (GOTV) efforts than it was about breaking news in a fun way. By contrast, McCain's campaign discussed the same strategy and rejected it as »beneath« a presidential candidate. The McCain campaign, mired in tools and strategies that might have worked in previous campaigns, sent only a single text message in the whole campaign – one reminder the day before the election. The Obama campaign, on the other hand, built up a list of more than three million cell phone numbers and then, in the days leading up to election day, supporters received targeted texts based on their zip codes with information about where to vote and how to get more information.

Going All-Out

So how did all this work in practice? The aforementioned Philadelphia »race« speech on March 18, 2008 shows some of the cross-platform integration that helped power the campaign. The campaign used every platform available to it to promote the speech: e-mails, SMS, blogs, the campaign website, social networking sites, and YouTube were all involved in spreading news of the event. In fact, the sheer breadth and scale of its online presence were impressive. The campaign had 57 separate MySpace profiles, as well as presences (both official and unofficial) on Facebook, Flickr, Digg, Twitter, Eventful, LinkedIn, BlackPlanet, FaithBase, Eons, Glee, MiGente, MyBatanga, AsianAve, and the DNC's own Partybuilder platform. Whereas only four years ago Howard Dean's campaign ran just two websites – its official one and the campaign blog – Obama's team oversaw more than a hundred different websites, from MySpace to Fight-TheSmears.org.

The campaign worked hard to fine-tune its targeting ability to hone in on just those most likely to attend events. The overall opt-in e-mail list ended up at more than 13 million, though it was rare that the whole e-mail list would ever get exactly the same e-mail. For one thing, the campaign tracked when people tend to open/read their e-mails and segmented the list accordingly – if you're an early morning e-mail person, you'll get the e-mail then; if you have a record of doing e-mail late in the afternoon, you'll get it then. More than that, though, the campaign used its vast database to continually refine your interests and preferences. If you had donated \$25, you might get an e-mail asking you to donate \$50; if you gave \$50, you would get an e-mail asking for \$100. If you had made telephone calls, you might get an e-mail asking you to host a house party. All told, the campaign created some 7,000 different versions of targeted e-mails. That tiered ladder helped push supporters to get more involved at every step. While the average number of donations per contributor was just over two, tens of thousands donated many times. The Obama campaign refused to release specifics about its donor breakdown.

One key to the campaign's success was how MyBO's online tools allowed the campaign to build its organization long before official staff arrived in an area. Sam Graham-Felson, the campaign blogger, recalls arriving in Durango, Colorado, in 2007 to find a well-developed community team who had been organizing sign-waving visibility at the local farmers' market for months – and all of their work canvassing neighbors and undecided voters had been fed constantly back into the campaign database even though no paid staff were around. In June 2007, just six months after Obama entered the race and more than seven months before the first votes, the campaign organized a 50-state »Walk for Change« event that spawned 2,400 events in all 50 states. Using MyBO and the campaign database, Obama for America carefully kept a record of what each supporter on MyBO did, how many telephone calls they placed, how many events they attended, how much money they donated and raised. Hildebrand says the campaign learned from Howard Dean in 2004 that the Internet alone won't win an election, but that by marrying the offline and online components, the campaign could create an unbeatable force. They constantly finessed it: as the campaign learned that its supporters broadly fell into two categories – those who made hundreds of voter contacts and those who made around 10 (with not many in between) – the campaign tweaked its tools to make sure that those first 10 were real neighbors. »If you're only making 10 calls, it's better to make

them to the people on your street than to people anywhere in the country,« Hughes says.

The campaign directly attributed its success on the February 5th Super Tuesday primaries and caucuses – which provided the lead that Hillary Clinton eventually found insurmountable – to its online organizing: the Obama campaign won big in places like Wyoming where there weren't many paid staff but there were self-organized groups that had been at work for a year. Groups in Arizona and New Mexico were canvassing undecided voters by August of last year using lists generated through MyBO. »This was way before real staff were dropping into the states,« Graham-Felson says. »It wasn't just about putting staff in, it was giving people the capacity to organize themselves.«

Funny efforts like the self-organized »Bridges for Obama« movement, where people sent in photos of themselves holding Obama signs, led to hundreds of events across the country, and the Obama campaign was inundated with tens of thousands of birthday messages on his Facebook and MySpace pages. When in the summer of 2008, the campaign planned over 1,000 meetings across the country to generate ideas for inclusion in the DNC platform, it didn't send a blast e-mail about it. Instead, the campaign combed its database for the people most interested in policy and targeted them for e-mails asking to host or find a party – only after first reaching out to its 50,000 core organizers who had previously hosted events to get them to prepopulate the site and organize events. More than nine million calls were made via the online phone-banking tools on MyBO and the campaign's online voter registration project, Vote-forchange.com, launched in September 2008, registered more than 700,000 in a matter of weeks.

Perhaps the best single example of the campaign's ability to put all the tools together came with the Biden announcement. The text message the campaign sent out read, »Barack has chosen Senator Joe Biden to be our VP nominee. Watch the first Obama-Biden rally live at 3pm ET on www.BarackObama.com. Spread the word!« Because of the campaign infrastructure, it could just direct viewers right to the campaign website, rather than CNN or one of the networks, which meant that the campaign controlled the whole event coverage – and could put a big donate button right next to the webcast. Once on the site, visitors could sign up to volunteer, get more involved, read more about Joe Biden, or even, later on, view the text of the announcement speech. As Ganz explains, it was this tight integration between all platforms that helped power the Obama

campaign: »Saul Alinsky said there are two forces of power: organized power and organized money. Obama managed to figure out how to do both.«

What President Obama does with the platform and movement that grew up around Candidate Obama is still an open question. As Joe Trippi says, »in 2004, we were the Wright Brothers and compared to us Obama's campaign was the Apollo moon shot. Now that he's in the White House, though, he's back to being the Wright brothers – the first networked president.« However, there are already signs of how an Obama White House will be different: thousands of people responded to a plea from health care czar Tom Daschle when he asked for suggestions about how to tackle reform.