

Digital Grassroots Advocacy Implementation Plan

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TransCanada

Table of Contents

Table of Contents	2
Building the Grassroots Mobilization Program	3
Foundational activities: discovery, development, and targeting.....	3
<i>Grassroots Website</i>	3
<i>Host Location</i>	3
<i>Information Architecture</i>	4
<i>Design Integration</i>	4
<i>Content Sections</i>	4
<i>Building the Advocacy Action Centre</i>	5
<i>Targeting</i>	6
Campaign Launch	7
<i>Internal Recruitment</i>	7
<i>External Recruitment</i>	7
<i>Tracking and Data Management</i>	8
Ongoing Communications and Mobilization	8
<i>Engagement and Education</i>	8
<i>Channels</i>	9
<i>Mobilization</i>	9
<i>Political mobilization</i>	10
<i>Potential advocacy actions</i>	10
<i>"Recency" and the propensity to act</i>	11
Next Steps	11
Appendix I	12
<i>Action centre sample pages</i>	12
Appendix II	14
<i>Sample Paid Recruitment Creative</i>	14

Building the Grassroots Mobilization Program

This plan, in conjunction with the Digital Grassroots Advocacy Vision document, details specifically how the grassroots effort will take shape and launch.

Foundational activities: discovery, development, and targeting

To launch the grassroots program, we must first:

- **Design and build** an appropriate action center website to anchor and facilitate the campaign
- Develop a **model for recruiting** the right number and demographic/geographic mix of grassroots advocates
- Draft content to attract potential advocates, present a compelling argument, capture their information at their point of interest and then present meaningful ways to **engage in the effort**
- Launch a suite of tools that **enable advocates to take action**

Embedded in each of those steps are specific moments to closely plan and coordinate the grassroots program elements with key TransCanada stakeholders, including government relations, community relations and internal communications.

Grassroots Website

Grassroots advocates require a tailored experience different than more traditional, information-presentation web experiences. Content will be specifically tailored to advocacy audiences, including clear calls to action and strong statements of support for the project and its benefits.

Host Location

One early decision we will have to make is simply: where should the grassroots hub be housed amongst the existing TransCanada and Energy East web properties?

- Option 1: create a **new section** of content on www.energyeastpipeline.com or www.transcanada.com/energy-east-pipeline.html and integrate the action center features into the CMS and publishing tools currently in use.
- Option 2: create a **stand-alone advocacy microsite** at a new, complimentary domain. This could be associated with either EE specifically (e.g. www.buildenergyeast.com) or TC more broadly (e.g. www.transcanadaaction.com).
- Option 3: take a hybrid approach and create a visually integrated but **technologically distinct subdomain** of an existing TransCanada web property. For example action.energyeastpipeline.com and action.oleoducenergieest.com.
 - **Recommendation:** Edelman recommends deploying Option 3 with a subdomain. This approach allows for total control of action center content and information without implicating any internal firewalls or security policies. Additionally, we should test the efficacy of a handful of vanity URLs in our recruitment advertising.
 - Consideration: TransCanada will need to provide a contact with the appropriate web development and technology/IT contacts

Information Architecture¹

Edelman's IA process will include landing pages, mobile devices and will consider action paths for advocacy, event registrations and new email acquisition. Edelman will develop wireframes for desktop, tablet and mobile devices using Axure (axure.com) to create simulated and navigable mockups of the site.

Design Integration

Once the wireframes are complete, the design of the grassroots sections will be derived explicitly from the "parent" website.²

The design will be modern, responsive web design that deploys the latest visual capabilities while maintaining proper SEO and usability.

Typically the design process includes 2-3 rounds of revision which leads to a finalized, consolidated look and feel that expands across desktop, tablet, mobile and social media.

- Consideration: Edelman will utilize TransCanada's existing processes for creative approval.

Content Sections

The grassroots website will require unique content to describe the value and purpose of the program to potential advocates, to clearly articulate constituent advocacy as a concept to audiences who may be unfamiliar with it and to establish compelling ways for individuals to take action.

Edelman will develop:

- **About Energy East Action³:** details the purpose of the program, its sponsorship and how it connects to the broader effort to support development of the pipeline
- **What You Can Do:** explains how interested citizens can engage in the process and make a difference; what an individual should expect if they sign up
- **Take Action:** present specific opportunities for grassroots advocates to engage and show deepening levels of commitment

To reduce approval churn, Edelman will derive and expand upon materials developed in other parts of the program to tailor them for grassroots audiences.

All content will be presented in English and French. The grassroots website will allow users to easily toggle between English and French presentation.⁴

¹ As Edelman understands TransCanada is restructuring its web standards, the IA can be based on the existing or new structure, based on TransCanada's preference and rollout plans.

² Site design direction will be taken from the most current design standards for Energy East in development.

³ Edelman will develop a formal recommendation on the grassroots effort's campaign name based on overall Energy East campaign messaging.

⁴ Consideration: is French translation sufficient? Or will broader tailoring be required?

Building the Advocacy Action Centre

To facilitate outbound actions, Edelman will build and deploy specific tools that easily allow grassroots activists to be effective advocates.

Edelman will deploy its Grassroots Multiplier CRM platform, a propriety software suite that includes a custom version of Salesforce.com integrated with an enterprise mass mailer, event management tool, flexible political advocacy engine and the ability to integrate with other Salesforce or API driven web applications.

Grassroots advocates' data will be housed by Edelman's instance of Salesforce in their North American cluster. Edelman will work with TransCanada's compliance staff to ensure that our approach to data protection and privacy meets TransCanada's requirements.

At launch, the site will prompt users to complete the following actions:

- Sign a petition of support
- Share their support via social media
- Tell their story and reasons for support
- Register to attend a local event

Each of the actions will include language that opts in the user to receive ongoing email communications from TransCanada⁵, and all content will be approved by both client and legal counsel in both English and French before launch.

Tools for direct advocacy to influence or contact policymakers will be built but not included on the site at launch.



In Appendix I please find examples of Action Centre pages.

⁵ Multiplier is compliant with and enforces practices consistent with Canada's Anti-Spam legislation due to take effect July 1, 2014

Targeting

We understand that our overall first-year recruitment goal is 35,000 advocates. Before we launch, we will refine the segmenting model below that reduces that total number into much smaller chunks and develop targeting tactics against each. Then, in partnership with the social and insights teams, we will identify platforms or channels through which those segments are most likely to be found.

Supporter Type	Goal	Connection (Benefits/ Fears)	Key Message(s) to Deliver	How to Engage	Channels to Use
TransCanada Employees	1,200 ⁶	Jobs	Energy East means jobs and continued growth	Internal email; intranet; internal meetings	TBD, LinkedIn
"Indirect" employees	1,000 ⁷	Jobs	Energy East means jobs and security	In-person meetings; via partners; internal email	LinkedIn
Canadian security and sovereignty advocates	TBD	Energy security; dependence on unfriendly states	Canadian resources for Canadians	Targeted online advertising; email lists	Facebook; Twitter; blog ads
Quebec groups	TBD	TBD	TBD	TBD	TBD
Landowners/farmers	TBD	Income	Financial security	Email database; local events	TBD
Affected communities	TBD	Tax revenue and infrastructure	Pipeline development means community development	Local events; targeted online advertising	Local news outlets
Unions (domestic)	TBD	Jobs	Canadian built	Direct outreach	LinkedIn
End-user consumers in Eastern Canada	TBD	Access to supply	Lower prices	Targeted online advertising	TBD
Pro-energy production citizens	TBD	Ideological	Harness our resources to benefit everyone	Targeted online advertising; email lists; allied organizations	Facebook; Twitter
Economic development advocates	TBD	Jobs and revenue	More than building a pipeline – building a stronger Canada	Targeted online advertising; email lists; allied organizations	Facebook; Twitter
TransCanada Shareholders	TBD	Revenue	Energy East is a smart investment for the future	Events and calls; outbound materials; existing databases	Investment websites

⁶ 25% of TransCanada's 4,800 employees

⁷ 10% of projected 10,000 jobs created by Energy East

Campaign Launch

To launch the site, we will:

- Introduce the site to natural allies and internal audiences, asking them to share it with their networks and likely supporters
- Deploy targeted paid recruitment tests on a large number of channels to develop our initial cost per acquisition (CPA) model before moving forward with larger spends.

Internal Recruitment

Edelman will work with the community engagement, internal communications, and other teams within TransCanada as appropriate to determine which data and audiences currently exist and would make sense to integrate or invite into the grassroots program. This will include interested parties identified at the open houses, supporters identified through other engagements, employees of TransCanada, employees of vendors, suppliers and customers of Energy East, and others as appropriate.

Edelman will collaborate with TransCanada to address concerns specific to their audiences, including the current precedents for employee communication and activation, HR restrictions, data privacy policies, labor laws and regulations, and other company culture nuances that could contribute to the success and compliance of the program rollout.

External Recruitment

Edelman will launch a concerted and focused effort to recruit new supporters based on agreed upon demographic and interest-area criteria above.

- **Creative and copy:** Edelman will develop online advertising units (Facebook advertisements, Twitter cards, banner ads, email newsletter copy, etc.) designed to draw in logically interested parties and encourage them to sign up to learn more about and advocate for Energy East. (Sample executions are included in Appendix II of this document.)
- **Placements:** Edelman will identify targeted online properties where placing our recruitment materials will most likely yield advocate conversions. These may include news and political blogs, contextually relevant articles and social media platforms.
- **Other channels:** TBD
- **Landing pages:** as part of the launch of the grassroots section of the website, Edelman will develop a template for easily customizable landing pages which can be tailored to different audiences and messages and also easily multivariate tested.
- **Thank you:** recruited advocates will receive a follow-up email thanking them for signing up, explaining the effort to support the project and inviting them to continue to participate. *and share*
- **Testing and enhancing:** every piece of the process described above will be continually tested, refined and enhanced based on performance. Our key metric of success is the cost per acquisition (CPA) of a new grassroots advocate. Testing will be based on a clear model of data analysis and optimizing based on results:

SAMPLE:

PAID RECRUITMENT	Launch	Analysis	Optimization	Refinement
Task	Recruitment ads placed in 10 different sites	Placement analysis and cost performance	Recruitment ads placed on top 5 performing sites	Data analysis and advocate quality analysis
Timeline	2 weeks	3 days	4 weeks	4 days
Budget	\$25,000	-	\$75,000	-

ORGANIC RECRUITMENT	
Task	Outreach to organizations, trade groups, blogs, conversions from social media properties
Timeline	Ongoing

Tracking and Data Management

- ✱ Every grassroots advocate record will be tagged and tracked based on how/where they were recruited, which message stream they responded to and how they perform over time. These metrics will enable us both to tailor outbound communications to user preferences and to enhance future recruitment efforts.

Ongoing Communications and Mobilization - Why the wait?

Following the launch of the site and advocate recruitment campaigns, we will:

- Conduct multi-channel engagement and education communications with our advocates to deepen their commitment
- Build a mobilization plan and platform to direct advocates to communicate with the appropriate decision makers at the appropriate times in the process

Engagement and Education

We will communicate with our advocates regularly about the pipeline through the lens of issues, values and ideas they care about.

This structured process will educate and season the advocates, draw them into a sustained conversation and demonstrate how their participation is crucial to its success. This will keep them committed throughout the duration of the campaign.

To recruit advocates, site must

introduce the

Compelling arguments that will convince

them to come

forward an

voice their

support.

In addition to the structured messaging, timely or newsworthy messages can be accommodated. These include polls and surveys, geography-specific or audience-specific messages, and stronger calls-to-action. This ensures that individuals are engaged and informed when no action is necessary, while enhancing the database and advocate progression.

Channels

- **Email Communications:** Edelman will deliver regular, segmented and targeted email communications to the grassroots supporter base. These communications will offer them additional information, draw them into the conversation, encourage them to share more about themselves and help them become comfortable with speaking out and advocating on behalf of the project. A specialized advocacy copywriter will be dedicated to this program (with QC support) to ensure consistent voice and approach.
- **Social Media Integration:** the grassroots advocacy campaign will integrate with the ongoing social media communications. This will include cross-purposing of dynamic content that is created for the campaign and mirroring calls to action across all communications platforms.
- **Employee Communications:** Edelman will work with TransCanada's internal employee communications teams to help deliver key messages and calls to action related to the Energy East effort into relevant TransCanada publications and communications.
- **Vendor/Supplier/Customer Communications:** Edelman will partner with the appropriate TransCanada staff to determine how and when TransCanada communicates with its business partners on the pipeline and develop materials to appropriately engage them and encourage them to join the effort in support of Energy East. For select and interested partners, Edelman will create custom toolkits and co-branded landing pages for their own audiences.
- **Offline Integrations:** any activity where TransCanada engages with citizens about Energy East can include references to opportunities for supporters to get involved and take action. Edelman can work with the community relations teams and other relevant parties to help include clear and prominent links back to the grassroots programs throughout these programs and materials.

Mobilization

Immediately following launch, we will begin to ask our advocates to take action, designed to deepen their relationship with the project, and to influence the online conversation.

- again, in the midst of much controversy, a simple request to sign off on
1. **Sign a petition in support of the project:** to demonstrate their support for the project, which can be surfaced en masse or in geographically segmented slices as appropriate, advocates will first be asked to sign a petition calling on all parties to support expedient development of Energy East⁸

⁸ Petition data can provide very useful content opportunities for other parts of the campaign, e.g. a map of supporters superimposed on the proposed route can visualize and demonstrate support among affected communities.

2. **Share your support via social media:** to drive further action within the personal and professional social networks of supporters, all advocates are encouraged to post a message to their Facebook wall and Twitter feed
3. **Share why you support the project:** this action will encourage supporters to share their point of view on why it is important to build Energy East without delay. These stories will be categorized by theme and geography and can be surfaced appropriately across all communications channels
4. **Attend a local event⁹:** advocates will be presented with town hall and other forums held by TransCanada or supportive third parties and encouraged to attend and bring others
- OK 5. **Tell your friends to get involved:** urge supporters to recruit friends, family and colleagues to join the effort

Political mobilization

Acknowledging the lack of widespread familiarity with grassroots programs, before we deploy direct political or policy advocacy (e.g. encouraging activists to directly participate in the regulatory or political processes or to contact their representatives) we will need to collaborate with other TransCanada stakeholders, chiefly the government relations team¹⁰. As we evaluate potential advocacy opportunities we should ensure that we:

1. Do no harm to other campaign efforts
2. Closely tie the actions to the broader campaign goals
- 3. Choose actions that motivate our advocates to engage deeply and frequently

- Consideration: [TBD based on guidance to effectively collaborate with GR]

Potential advocacy actions

- Signing a petition indicating their support (or opposition to misguided actions)
- Sending a letter, email or placing a phone call to their political officials, including their mayor, local or provincial government officials, regulators, MPs, ministers or other logical parties
- Sending a letter to the editor of their local paper(s)
- Commenting on a blog or social media post
- Sharing content on their social media properties
- Sharing their personal story about why the support development of Energy East is important
- * • Submitting a supportive comment to the NEB, OEB, BAPE or other regulatory bodies
- Attending events, rallies or discussions about the project
- Recruiting and informing their friends, family and neighbours about the project
- Voicing their support of the project to candidates for political office

⁹ Provided that driving attendance to existing events is desirable to the Community Relations team and other TransCanada stakeholders

¹⁰ This part of the program may require the incremental and specific approval of other TransCanada leadership.

- Testifying or meeting in person with officials reviewing the project to voice their support
- Appearing or lending their name and/or story to advertisements, materials or other promotional items

For each action Edelman will develop¹¹:

- Call to action email and social media language
- Web page content contextualizing the action
- Sample content (letter to policymaker, social media post, etc.) for the advocate to share with the target
- Thank you and follow-up next steps web page content upon completion of the action

“Recency” and the propensity to act

Advocacy actions will be linked together and presented sequentially to those who complete them. For instance, when a user signs the petition, he will be immediately asked to share that on social media. If a user shares her story of support, she will immediately be asked to share the same story with her friends.

This approach has shown a greater than 50% increase in users’ multiple actions, and is the most reliable way to identify those advocates who can be counted on to take more significant and meaningful actions.

Next Steps

Pending your approval, Edelman will begin work on:

- Launching the Energy East grassroots online advocacy headquarters ✓
- Activating the Energy East advocacy technology platform
- Developing recruitment copy and creative
- Integrating with appropriate TransCanada staff to identify and secure supporter and employee data
- Securing placements for paid recruitment advertisements
- Writing the requisite advocacy content, calls to action and outbound communications

¹¹ Content and infrastructure for the additional advocacy actions will be built out during the launch phase, but not presented on the website or to advocates until TransCanada and Edelman deem it strategically valuable to do so.

Appendix I

Action centre sample pages

Basic home page for grassroots advocacy website



Energy East Pipeline

AboutBenefitsStakeholder EngagementEnvironmentSafetyAboriginal RelationsOur ResponsibilityMedia

Join us and help build Energy East.



Speak out now

Lorem ipsum dolor sit amet
consectetur adipisicing elit sed do
eiusmod tempor incididunt labore.

We know how important our work is. We work hard to deliver the reliable, affordable energy that keeps our nation
running. As an industry, we have the power and responsibility to come together on advanced solutions that build impact
America's energy future. Take action today and support our industry.

Take action now

Share your story

Meet Us In Person

Find out more about information
sessions in your area.

Ask Your Questions

TransCanada would like to hear
from you. We will respond to
you directly and share frequently
asked questions here.

See Us on YouTube

Visit our YouTube channel to
learn more about TransCanada
and pipeline safety.

Stay in Touch

Sign up to receive the Energy East
Community Link newsletter for the latest
updates and info on the project.

Name:

Email:

Mailing address:

Submit

Recent Tweets

» dPhreeRuperGas Transmission
Project to seek public comment on
Environmental Assessment
Application. <http://t.co/0Gm32Zx6l>

» Creating a "natural classroom" in
Hudson's Bay Wetlands Trail in
Northern B.C. <http://t.co/2v3X0y6Qa>

» Rusty Getting: TransCanada holds
investigative for all costs of
damages and clean up from pipeline
incident. <http://t.co/4JL705316P>

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Contractors and Vendors



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[illegible]

Appendix II

Sample Paid Recruitment Creative

Energy East.



Canadian resources should help Canadians. You can make a difference.

[Sign the petition.](#)

👍 Like - Susan Smith likes Trans Canada Energy East Pipeline

Figure 1: Canadian national security supporters



Figure 2 Canadian labor supporters



Figure 3: Farmers, landowners directly affected communities

TransCanada Energy East Team Meetings

What	Day of the Week	Who	Frequency	Time (MST)	Format	Participants/ Distribution	Deliverable	Owner
Daily Media Relations Call	M,T,W,TR,F	Client Facing	Daily	6:30-7:00am	Phone Call	Elise, Justine and Jonathan to review media and action items for the day with Respond team as needed	Actions Items	Elise Boutin-Michaud
Daily Campaign Meeting	M,T,W,TR,F	Client Facing	Daily	8:45-9:00am	TBD	Jacque to convene daily campaign meeting to address the issues of the day; Amy/Marina to action items across all functions as needed	Actions Items	Jacque Benson
Weekly New Brunswick Consultants Call	Monday	Client Facing	Weekly	7:00-8:00am	Phone call	New Brunswick CR, GR and AR teams gather for updates/action items; Elise participates	Status Report Action Items	Patrick Lacroix, CR New Brunswick lead
Weekly Status Meeting	Monday	Client Facing	Weekly	9:00-10:00am	Meeting	Amy and Marina to meet with Jacque; Cascade key points to team leads as needed	Status Report Action Items	Amy Hemingway
Weekly DGA Check-in	Monday	Internal	Weekly	9:00-10:00am	Meeting	DGA team check in	Status Report Action Items	Lisa Lewis
Weekly Quebec Briefing	Monday	Client Facing	Weekly	12:00-1:00pm	Phone call	Elise and Jonathan debrief on Quebec	Briefing	Elise Boutin-Michaud
Weekly Ontario Consultants Meeting	Monday	Client Facing	Weekly	12:00-1:00pm	Phone call	Ontario CR, sometimes GR and rarely AR teams gather for updates/action items; Melissa participates	Status Report Action Items	Jon Pitcher, CR Ontario team lead

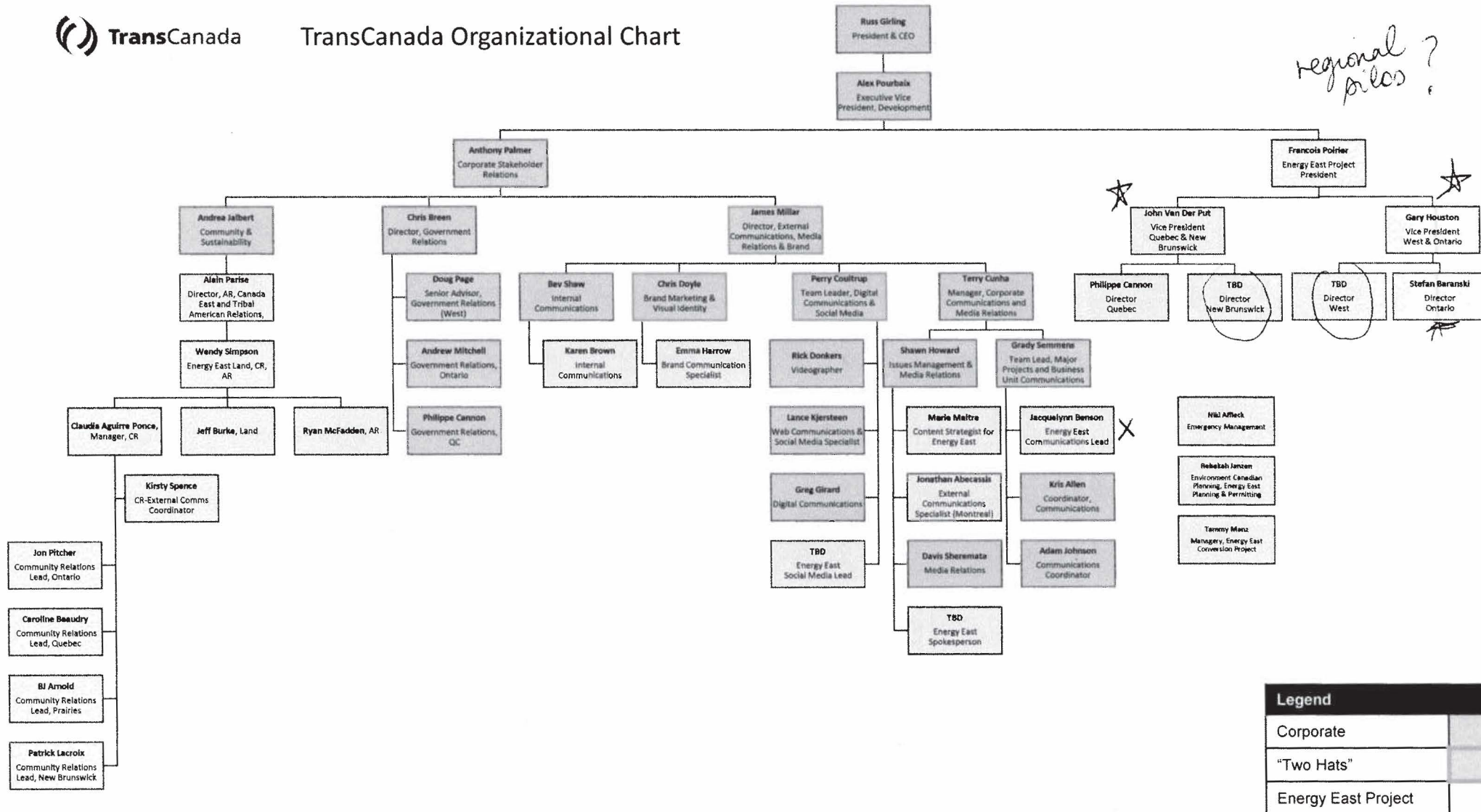
Weekly Status Call	Monday	Internal	Weekly	1:00pm – 1:30pm	Phone Call	Quebec and PR teams regroup to share info and update on work – Marina and/or Amy currently attending for extra support	Action Items	Justine Lord-Dufour
Digital/Grassroots Weekly Status Call	Tuesday	Client Facing	Weekly	11:30am – 12:00pm	Phone Call	Digital/Social and Digital Grassroots Advocacy Team Regroup with Perry on ongoing work	Status Report Action Items	Matthew Hayles
Weekly Status Call	Wednesday	Internal	Weekly	1:00pm – 2:00pm	In person meeting/phone call	Campaign Management team meets to coordinate activities	Agenda Action Items	Marina Connors
Internal External Comms Meeting	Wednesday	Client Internal	Weekly	3:00 – 4:00pm	Meeting	Jacque meets with Chris, Perry, Jonathan (TBC)	Feedback to Edelman	Jacque Benson
Comms/CR Collaboration Call	Thursday	Client Facing	Biweekly	8:00 – 10:00am	Phone Call	Edelman convenes Comms/CR collaboration call to bridge the two EE functions	Each team gives updates as appropriate	Amy Hemingway
Digital/Paid Media/Monitoring/Creative Team Meeting	Thursday	Internal	Weekly	10:30-11:00am	Video-conference	Dave convenes digital and other teams for status updates by core activity	Status report and action items	Dave Fleet
Weekly Leads Call	Thursday	Internal	Weekly	12:00-1:30pm	Phone Call	Leads to provide team updates on progress/week's activities/approvals/asks to make of EE in weekly status report and/or on Monday	New requests for client, road blocks, internal updates	Amy Hemingway

Other meetings to be addressed:

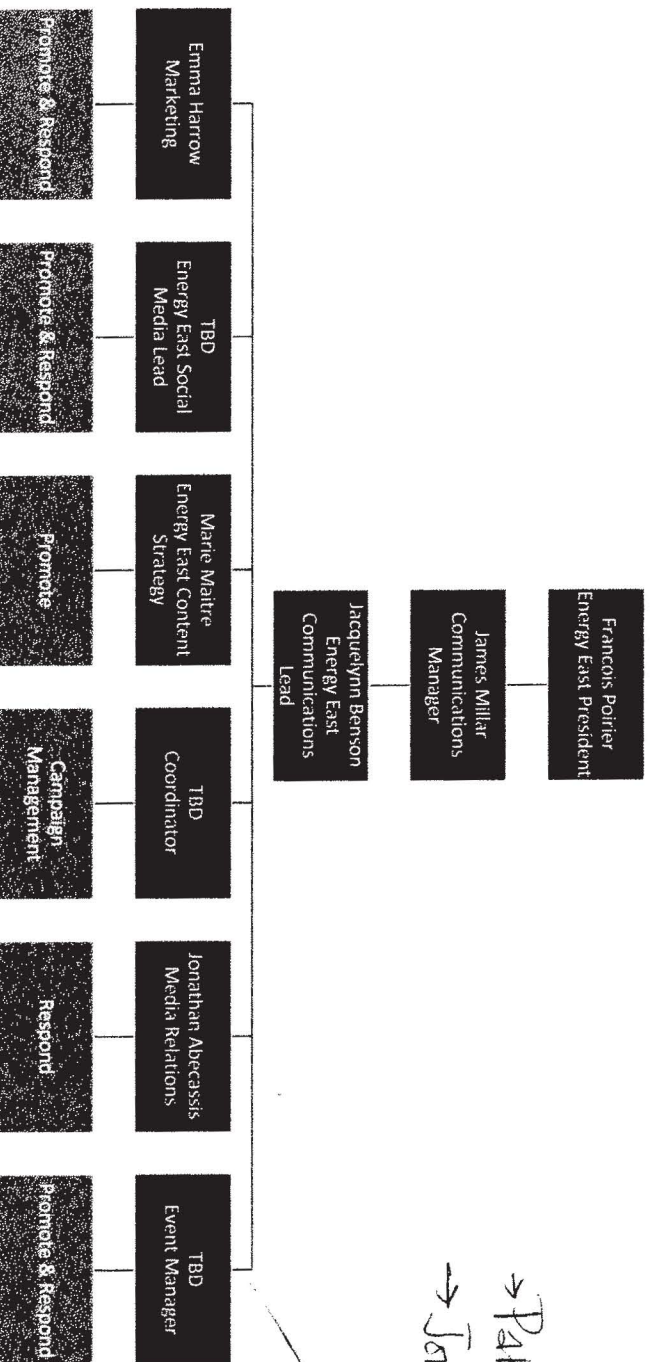
- P/R/P
 - Promote – weekly?
 - Respond – daily?
 - Pressure – biweekly?
- Functional meetings
- Strategy/Quarterly Check-in



TransCanada Organizational Chart



Proposed Structure for Promote, Respond, Pressure



→ Patrick Lacroix
→ Jon Pitcher

TRANSCANADA ENERGY EAST TEAM

STRATEGY TEAM

CORE FUNCTIONAL LEADS

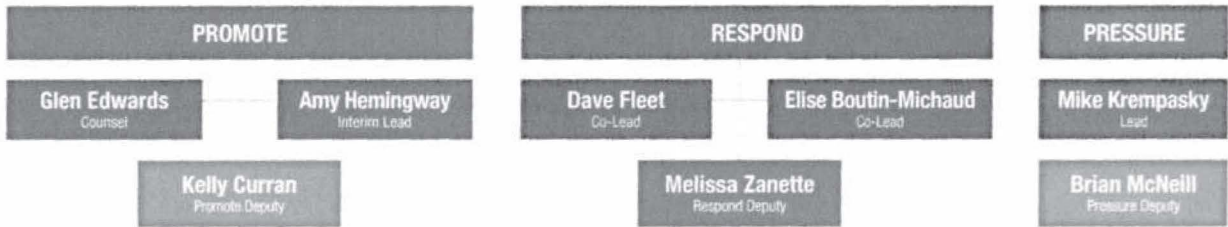
Laurie Stretch CRM & Project Leader
John Clinton
Tristan Roy
Dave Fleet Digital/Social
Elise Boutin-Michaud Public Relations and Quebec
Mike Krempasky Digital Grassroots Advocacy

CAMPAIGN MANAGEMENT

Amy Hemingway
Campaign Manager: Calgary

Marina Connors
Campaign Coordinator: Calgary

Carter Greer
Staff Support: Calgary



FEED INTO AND SUPPORT PROMOTE, RESPOND, PRESSURE TEAMS

CROSS FUNCTIONAL TEAMS

CREATIVE/PAID MEDIA SUPERGROUP

Sara Lamb
Account Director

TBD
Account Manager

TBD
Account Lead Quebec

Jordan Doucette Executive Creative Director
Becca Young Creative Strategist
Saeed Zaman Paid Media Lead

MONITORING, INSIGHTS AND MEASUREMENT (MIM)

Rob Clark
Lead

Brittany Dow
Deputy

TBD
Digital Designer

Scott Tavener
Writer

TBD
Integrated Producer

TBD Creative Team
Support

MIM TEAM
Alexis Pinard
GC Strategist

Lori Isber
Sr. Account Manager
Alexandra Krivov
Media Planner

*Brian King Scott
(paid media)*

