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Digital Advocacy and Salesforce

Updated, October 2022

Now more than ever, your digital advocacy platform is a critical component of your campaign toolbox. While there are many products available that connect activists to their elected officials, the number of those that work well with Salesforce is relatively small (although it's gotten bigger since the last time we published this report).

If you use Salesforce, need digital advocacy tools, and are serious about 360° engagement with a single database of record, this report is for you. This platform review will help campaigners, Salesforce admins, and technology decision-makers choose the best platform based on its advocacy feature set, the strength of its Salesforce integration, and its price point.

About our method. We participated in demos of advocacy tools and Salesforce integrations for all the reviewed products, delved into documentation, read reviews, and received feedback from our own clients when possible. When evaluating any new technology, you should ask to speak with current clients for their thoughts on a product's strengths and weaknesses and the ease of getting help. To that end, we include a customer list at the end of each review if the platform supplied one. Want to find others using these platforms alongside Salesforce.org's NPSP? Visit the Trailblazer group App Advice and Consumer Reports and #Advocacy topic.

The Basics
First, let's review the common ground. We'll discuss the structure and features that all the products share. Later we'll dive into the features of each platform so you can decide which tool is right for your needs.

The Platforms
> Action Network
> ActionKit
> Capitol Canary (formerly Phone2Action)
> Engaging Networks
> KnowWho (acquired by Capitol Canary in 2020)
> New/Mode
> Soapbox Engage

Common Functionality

Online advocacy platforms enable your supporters to deliver a direct message to their elected officials and other campaign targets. Your supporters click through your link via email, text, phone call, or social media and land on a web page with a pre-written, customizable message or on a scripted phone call. Each product identifies the appropriate official and sends the message or facilitates the phone call. The platforms vary in how they accomplish this and in their additional features, but these are the basics for all the advocacy platforms in this report.

Here are some additional features that are common to the platforms we've reviewed:

- All have access to contact information for US federal and state legislators, and they automatically match your supporters based on address. See the chart below for which tools can handle local municipalities and/or jurisdictions outside the US.
- All have some way for you to supply a message for your supporters to send. They also all allow your supporters to customize messages if you enable that option.
- Most will enable you to embed their action pages in your website, with varying levels of customization for branding purposes.
- All target custom contacts for specialized outreach (for example: sending a message to a corporate CEO).
- All include a feature to contact elected officials, including those officials that only offer online contact forms. All included platforms will post correctly to the official's form from an action page.
- Most offer a cloud-based database where you interact with your supporter and campaign data. They sync some level of this data with Salesforce but intend for you to build actions, send messages, review stats, etc. with their online tools.

This is where the similarities end. Each platform has a different focus and unique features so, depending on your mission, one of these may meet your needs better than the others. The comparison chart below offers a quick reference for your initial review.

Advocacy Platform Comparison Chart

BASICS		Action Network	ActionKit	Capitol Canary	Engaging Networks	Know Who	New/ Mode	Soapbox Engage
Pricing		$	$$$	$$	$$$$	$$$	$$	$
Target US federal officials		✓	✓	✓	✓	✓	✓	✓
Target US state officials		✓	✓	✓	✓	✓	✓	✓
Target US county and local officials (Population: 10K+)				✓	✓	✓	✓	✓
Target officials outside the US (Canada, Australia, UK, or EU. See platform notes below)				✓	✓	✓	✓	

	Action Network	ActionKit	Capitol Canary	Engaging Networks	Know Who	New/Mode	Soapbox Engage
Specify custom targets	✓	✓	✓	✓	✓	✓	✓
Email elected officials (Including contact forms)	✓	✓	✓	✓		✓	✓
Click to call, tweet, and facebook post to officials			✓	✓		✓	
Post to regulatory forms (Regulations.gov or other)	✓		✓	✓			
Supporters can customize your default message	✓	✓	✓	✓		✓	✓
Create and Manage Petitions	✓	✓	✓	✓		✓	✓

FUNCTIONALITY							
	Action Network	ActionKit	Capitol Canary	Engaging Networks	Know Who	New/Mode	Soapbox Engage
Robust tools to enhance social media impact and track activity	✓	✓	✓	✓		✓	
Ad tools/integrations for supporter acquisition	✓		✓				
Educational content on legislators/bills/current events					✓		
Part of larger standalone CRM platform				✓			
Embed action pages built on platform into your website	✓	✓	✓	✓		✓	✓
Prefill forms with your advocates data	✓	✓		✓		✓	✓
Conditional Content Builder for appreciation or accountability messages (sometimes referred to as "Thank and Spank"…but that label is overdue for retirement)	✓	✓		✓		✓	
Mobile responsive forms	✓	✓	✓	✓		✓	✓
Robust SMS features			✓	✓			
Events/Fly-in Management tools	✓	✓		✓			✓
Donations/Fundraising tools	✓	✓		✓			✓

INTEGRATION							
	Action Network	ActionKit	Capitol Canary	Engaging Networks	Know Who	New/Mode	Soapbox Engage
App available on the AppExchange			✓		✓		✓

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Feature							
Bi-Directional sync option	✓	✓		✓			
Elected officials can have their own records in Salesforce (Contacts or custom object)				✓	✓		
Data sync is highly customizable (what data/which objects)		✓	✓	✓			
Simple setup			✓		✓	✓	✓

Platform Specifics

Time to dig into each platform. We summarize significant features, Salesforce integration, and pricing, as well as supply a list of clients and informational links.

Action Network

The Action Network is a 501(c)(4) nonprofit organization formed in 2012 dedicated to building power for the progressive movement. They use the term "partners" to indicate that they want you to join them in using and developing their tools. Their pricing is modest compared to others we evaluated, but their Salesforce integration is limited.

The right fit for you?

The Action Network may be of interest to you if:

- You're working with a limited budget.
- You have a federated organization, local chapters, field campaigns, or similar structure.
- You are interested in collaborative advocacy work with others in the Action Network.

Highlighted Features

Out of the box, Action Network can target US federal and state officials and uses zipcodes or shapefiles to match advocates to their targets. Or, you can add your own custom targets to send advocacy messages to local officials, or other individuals or groups. They provide an email, mobile message, and a digital actions toolset, as well as features to manage:

- Events - either individual one-time events or organize a series of events (i.e. rallies across your state).
- Fundraising - using WePay or Stripe, or integrates with your ActBlue account.
- Networks - for federated organizations, coalitions, organizations with local chapters, field campaigns, and similar structures. A network is where groups can be linked together into a hierarchy, where they share data according to their place within the hierarchy, allowing groups to campaign together.

For an additional fee, you can add:

- Features to fill out the contact forms on target websites (ex. regulatory comment forms).
- Send text and call campaigns to engage activists with text-to-take-action on petitions, events, and forms using Action Network's Mobile Messaging partnership powered by Twilio.
- Click-to-dial calls, or target messages to US, UK, Canada, Australia, or EU elected officials via fax, tweet, or other channels using an integration with New/Mode.

Salesforce Integration Overview

The Action Network is designed to be managed via their online platform, but they do offer a fairly basic bidirectional (AN←→SF) sync with Salesforce. There is nothing installed in Salesforce that allows you to manage Action Network actions from there; the integration is designed for syncing your group's email list subscribers, including their action histories, donation data, and custom fields. The sync runs about every hour in both directions, however, for the initial install, it will take about a day for your Action Network data to show up in Salesforce and vice versa.

- Activists become Contacts (with matching based on email address).
- Subscription status becomes Campaign Members in the "Action Network Subscribers Campaign" and members of this campaign are subscribed to receive emails in Action Network.
- Actions are reflected as Campaigns, and campaign members are added when they take action.
- Donations become Opportunities, and associated custom fields can sync if set up as 'long text' and the field names match exactly.

Currently, event information does not sync with Salesforce, and there are a lot of other nuances around what will sync or not. Learn more about the Salesforce integration here.

Pricing Overview

The Action Network publishes its pricing model and they offer an online tool to easily estimate your costs. Please visit their site for their current partnership options and fees.

Their four "partnership" options are priced based on the number of emails you send per month and which features you want to be included – the first is free – but access to the Salesforce sync feature is only available to paying partners. And Mobile Messaging is powered by Twilio, so if you'd like to add Mobile Messaging, there are two more fees: an additional monthly fee for your Mobile Messaging partnership with Action Network, and a third monthly fee for your usage of Twilio.

As of this publication, their listed partnership fees include:

- Movement - $1.00 per thousand emails sent per month, starting at $10/month. This package does not include the networking/multiple groups features.
- Network - $2.00 per thousand emails sent per month, starting at $100/month. Includes the networking/multiple groups features.
- Or you can opt to purchase a custom "Enterprise" package (contact them for details).

Add on Mobile Messaging for:

- Movement - $10.00 per thousand messages sent per month, starting at $50/month plus telecom fees*. This package does not include any group features.
- Network - $20 per thousand messages sent per month, starting at $100/month plus telecom fees*, includes the group features.
- Or you can opt to purchase a custom "Enterprise" package (contact them for details).

*Telecom fees are based on the destination and type of message you are sending. [Learn more about Mobile Messaging pricing and fees here](#).

Clients that love this product

The Action Network works with organizations like United We Dream, Common Cause, the DNC, and others. But they were not able to supply us with any partners that they knew were using the Salesforce integration, and the organizations that we talked to had opted to build custom integrations with Action Network's API to meet their needs instead of using the out-of-the-box integration.

Visit them at [ActionNetwork.org](#)
Check out their [YouTube channel](#)
Check out [their blog](#) for case studies and partner profiles

ActionKit

ActionKit, [a part of the EveryAction family](#), offers a range of tools for advocacy, fundraising, get-out-the-vote, and online organizing that is only available to progressive organizations and campaigns. Their Salesforce integration offers bidirectional sync options and flexibility, but you may need a skilled developer to support your customization needs.

The right fit for you?

ActionKit will fit your needs if:

- You do distributed organizing: encouraging and managing user-hosted events.
- You have international or multilingual campaign needs.
- Your efforts include Get-Out-The-Vote campaigns.

Highlighted Features

With ActionKit, you can target US federal and state officials and geocoding assigns your supporters to the correct district. Or you can add your own custom targets to send advocacy messages to local officials, or other individuals or groups. ActionKit provides a toolset for email, action pages, and petitions, as well as features to manage:

- Events - ActionKit offers a toolset for distributed organizing and user-hosted events: Recruit members to host and attend events, with event management tools for staff and volunteers. Give event hosts tools, host materials, and reminders, while you track emails between hosts and attendees.
- Fundraising - Accept donations through Braintree, Authorize.net, PayFlow Pro, ACH, and PayPal, or integrate with ActBlue.
- International/Multilingual features - Use the built-in translations for Spanish, French, and Portuguese, or create your own for any language, including right to left. Then target your communications by user language, while also tracking combined action counts across page translations. And giving pages are equipped to allow for fundraising with international currencies.

Salesforce Integration Overview

ActionKit is designed to be managed through their online platform, but their ActionKit Salesforce app (beta) provides for a one-way or bidirectional sync between ActionKit and Salesforce NPSP for Contacts and Opportunities, and you can choose which direction you want data to flow (AK→SF, SF→AK, or both: AK←→SF). Here's how those syncs work:

ActionKit to Salesforce:
- ActionKit users become Salesforce contacts
- Donations become Salesforce opportunities, and recurring donations

Salesforce to ActionKit:
- The app pushes data from Salesforce to action, donation, and user tables in ActionKit.
- When a new user is created in ActionKit through the sync, that user is automatically subscribed to your default mailing list.

You can control which users/contact records are included in syncs between the two systems, and you will configure your settings in ActionKit to set which objects sync, in which direction(s), and customize the field mapping. With their custom field mapping feature, you can select the sync direction on a field-by-field basis (one-way or bidirectional).

Note: In ActionKit an email address is a user, and it is not possible to associate multiple email addresses with one person in ActionKit. This can result in duplicate records in both systems. ActionKit provides User Merge features to help manage duplicate records in their system, but there are some nuances to consider, and ultimately duplicate management will need some hands-on management in both systems.

Overall the ActionKit integration is flexible, but it requires careful planning and consideration in order to set it up for success. And you'll need some developer skills for most customizations. We found their documentation somewhat limited, but their support team is very responsive. Learn more about the ActionKit Salesforce app integration here.

Pricing Overview

ActionKit offers all of its tools with one monthly fee which is based on the number of mailable email users on your list and starts at $995/month for groups with lists of up to 50,000 emails.

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Clients that love this product

ActionKit clients featured on their website include ACLU, Everytown for Gun Safety, Natural Resources Defense Council, and The Intercept. We have clients using it, too; let us know if you want to connect.

Visit them at ActionKit.com
Learn more about their current clients
Check out their demo video

Capitol Canary

Capitol Canary, formerly Phone2Action, combined three companies so that they could provide an all-in-one solution that provides multi-channel advocacy tools, policymaker contact data, and legislative and regulatory intelligence into a single government affairs platform. It's not the cheapest option on this list, but the pricing is reasonable given the extensive advocacy features and straightforward Salesforce integration.

The right fit for you?

Capitol Canary will fit your needs if:

- You need a robust advocacy toolset that includes: text, patch-through calling, email, and social media.
- You don't mind having separate fundraising, peer-to-peer, or event solutions.
- Your efforts include Get-Out-The-Vote campaigns.
- If you're looking for a strong advocacy toolset combined with contact directories and federal intelligence, then Capital Canary with KnowWho might be the right option for you.

Highlighted Features

Capitol Canary provides a suite of advocacy tools to mobilize supporters, along with up-to-date contact information for officials and staffers at every level of government from federal to local offices nationwide, as well as officials outside the US. In addition, Capitol Canary provides:

- Custom Messages - so that supporters can create and share their personal stories and messages with elected officials using email, social media, and patch-through calling.
- Multi-Channel Engagement - to broadcast actions via SMS, email, and social media (Facebook and Twitter).
- Get Out the Vote - Use their Get Out the Vote election education tools, and find vote-by-mail, absentee ballot, and early voting information. Discover who is running in any district. And leverage text keywords (e.g., Text VOTENOW to 52886) to drive traffic to your branded Election Center.

Add-on options: For contact directories and federal intelligence, you might want to consider adding KnowWho products. KnowWho is now a division of Capitol Canary but the products and features still seem independent enough that we've listed them separately in this report.

Salesforce Integration Overview

The Capitol Canary integration is straightforward and streamlined through their Salesforce app, available on the AppExchange. You'll do most of your content creation and contact management in Capitol Canary, while in Salesforce you'll have data on action takers, their campaigns, and which legislators they reach.

Currently, this is a one-way sync (CC→SF), however, Capitol Canary says that a bidirectional sync is under development and coming soon. In the meantime, Capitol Canary offers a manual import for contacts from Salesforce reports or other data sources.

Capitol Canary creates standard Campaigns in Salesforce to match Campaigns created in your Capitol Canary instance. Supporter data is synced to the standard Contact object and Contacts are connected to Campaigns through the standard Campaign Member object. All field mapping in those objects is customizable.

There are two main custom objects:

- **Capitol Canary Legislator** = the targets of your actions (legislators or custom). Includes district information but no contact information (that is stored in the online platform).
- **Legislator Connection** = actions taken by contacts in relation to elected officials and displays the content of the communication the advocate sent.

Pricing Overview

Capitol Canary doesn't post its pricing publicly; please contact them for your own quote. Our understanding is that the cost of the product is dependent upon at least the following:

- Number of supporters in your database.
- Products and features being used.
- Telephony services (texting and patch-through calls).

Their listing in the AppExchange states that the package starts at $7,500 USD per organization per year with several pricing options that range by the focus of work (local, state, federal, or regulatory) plus several feature packages.

Clients that love this product

Organizations like the National Parks Conservation Association, Alzheimer's Impact Movement, Lyft, Ben and Jerry's, Fwd.us, and the League of Conservation Voters are using Capitol Canary. We have clients using it, too; let us know if you want to connect.

Visit them at CapitolCanary.com
Read their case studies

Engaging Networks

Engaging Networks began as an advocacy platform, and their Advocacy tool remains its most popular feature. Since then, they've grown their offerings to include a standalone CRM and a full-featured suite of online fundraising and advocacy tools. Of all the options we reviewed, Engaging Networks is the most expensive, but they also offer the most features and Salesforce integration flexibility. Keep in mind that the level of flexibility can add complexity, so you'll likely want to work with a partner developer or skilled admin to assist with setup.

The right fit for you?

Engaging Networks might be for you if:

- You have international or multilingual campaign needs.
- You need a robust advocacy toolset that includes: text, email, and social media.
- Your Salesforce sync needs are unorthodox; for example, you don't use NPSP or want to use only custom objects.
- You want a product that offers all the bells and whistles, and you don't mind the price tag.

Highlighted Features

Engaging Networks offers a multilingual and multi-currency platform that can target officials in the US, Canada, Australia, the UK, Germany, and the EU (full list). US databases also include committee and subcommittee targeting at the Federal and State levels. As a standalone CRM, they provide the standard set of advocacy tools as well as:

- Marketing tools - for email, SMS, and social media such as Facebook and Twitter.
- Donation pages - for direct and peer-to-peer fundraising, that can handle one-time and recurring gifts
- Event management - for virtual events via Zoom or in-person events with ticketed registration
- Supporter Hub - so supporters can log in to see their involvement with your organization — actions, donations, events, etc — and manage donations and email lists. You can feature the latest information on the campaigns that they've supported and engage them in the next steps.

Engaging Networks prides itself on being accessible and responsive to clients' questions and feature requests. Their Supportal features a knowledge base and many video tutorials, and their Academy provides self-paced video learning for all platform aspects.

A note on action targets: Federal and State officials are available out of the box in the US, and many local municipalities are also already available. If your mission focuses on an area whose local data has not yet been added, they may add it for you. For example, client requests led to the addition of US State Attorney General and City Council databases for New York, Washington, and Los Angeles.

Salesforce Integration Overview

Engaging Networks is designed to be managed via their online platform, but their Salesforce Connector allows you to sync data with Salesforce. In 2020, they launched their new Salesforce Connector V2 which they say will sync with any version of Salesforce and includes pre-built mappings for NPSP. There are two types of syncs that run with this app:

The **Contact Sync** runs hourly on a push-pull basis to keep the Salesforce Contact record in sync with its companion Engaging Networks Supporter record. You choose which data to sync and where it resides in Salesforce (in any standard or custom objects). The contact sync can be one-way (EN→SF or SF→EN) or bidirectional for some objects (EN←→SF). During your initial set-up, you will select which fields to sync from Supporter to Contact through their Contact Mapping wizard. The only required fields to map are Email Address and Last Name, but a number of other fields are available for custom mapping as well. Note: there is a set of default mappings already in place, which you'll want to review and adjust to meet your unique configuration needs.

Supporter actions (e.g. advocacy actions, donations, email opens/clicks/conversions, event registrations, etc.) are pushed to Salesforce in a one-way (EN→SF) nightly Transaction Sync. Using pre-set mapping rules, the data writes to the respective Salesforce Contact, Campaign, and/or Opportunity records. There is a set of default mappings geared for NPSP, but you can also create your own custom rules to meet your needs (e.g. if you don't use NPSP, or you want to write to custom objects). When using the default mappings, most supporter advocacy actions will result in campaign members with a status of "responded", while donations and event purchases create opportunities accordingly.

Note: Salesforce Campaigns and Campaign Members can be sent to Engaging Networks to segment email campaigns and upsert contact information.

While the new Salesforce Connector App was launched with quicker and simpler implementation in mind, the level of flexibility can still make setup complicated. We recommend that you work with a partner developer or skilled admin familiar with your Salesforce configuration to manage the process. And Engaging Networks provides a free 58-minute video course on the Connector setup in its Academy.

Learn more about it in their [Salesforce Connector overview](#).

Pricing Overview

Engaging Networks products are offered as modules you can purchase à la carte. Their annual subscription fee is composed of two parts: Which modules you use and the number of subscribers, incremented by 50,000. All licenses include unlimited users and email sends. Since the pricing is not publicly available, here are some pricing examples. Please contact Engaging Networks for your own quote:

- Advocacy only (no limit to the number of supporters): $19,895/year
- Advocacy + Email with 50,000 records: $22,195/year
- Advocacy + Fundraising + Email with 50,000 records: $26,450/year
- Peer-to-peer can be added to any package for $4,600/year + 2% transaction fee
- Events can be added to any package for $4,600/year + 0.5% transaction fee

The Salesforce Connector is an additional $249 per month.

Clients that love this product

Engaging Networks clients who use the Salesforce Connector include Mothers Against Drunk Driving, Oxfam, and Human Rights Watch.

Visit them at EngagingNetworks.net
Watch a marketing video

KnowWho

KnowWho is now a division of Capitol Canary, but the products and features still seem independent enough that we've listed them separately in this report. Unlike the other advocacy tools listed here, KnowWho is primarily focused on contact directories and legislative intelligence. They have spent over 60 years collecting data on elected officials and associated offices, and employ a large team of researchers who regularly update their information as things change.

The right fit for you?

KnowWho's data and Salesforce integration may be great for you if:

- You need excellent data on officials and their offices.
- You want to track relationships between your supporters and their officials *in Salesforce.*
- You're looking to monitor legislation within Salesforce.
- If you're looking for a strong advocacy toolset combined with contact directories and federal intelligence, then Capital Canary with KnowWho might be the right option for you.

Highlighted Features

With a focus on data, KnowWho provides an extensive data directory. Here is a partial list of the data you will get per US official:

- Contact information for each official, all their staff and district offices, committees, subcommittees, and leadership offices
- Photographs and biographies
- Staff emails and specific legislative issues and responsibilities

Many of these data points are stored as related records, each with its own rich data. For example, the Committees and Subcommittees dataset for a single official contains a list of the officers, majority and minority members, and staffers displayed in order of seniority. US data also includes clerks, staff, and law enforcement leaders in counties and municipalities. Learn more about KnowWho datasets.

Add-on options:
Zip-to-District Matching populates district information on contacts and creates relationships between your supporters and their elected officials in Salesforce. You pay on a credit basis; records remain updated for 12

months when a Contact or Account moves or districts change. You can process single records with a click or using their batch tool.

Legislation Monitoring allows you to search for and monitor important Federal or State Legislation from within Salesforce.

For an **advocacy action toolkit**, you might want to consider adding other Capitol Canary products as well.

Salesforce Integration Overview

Since KnowWho is primarily a data delivery product, its online platform is lacking a sophisticated UI, but its information is robust, transparent, and entirely available to you through your Salesforce integration. Unlike many of the other apps, KnowWho has integrations for all of their data products.

For their Federal, Congressional, State, and local Intelligence for Salesforce Apps, you purchase integration licenses and packages of data. This data is synced with Salesforce standard objects and updates nightly in a one-way sync (KnowWho→SF), including:

- Officials' offices are synced as Accounts.
- Officials and staff are synced as Contacts.
- Standard Activities or your own custom object can record interactions with officials and offices.
- All of the other data is brought into Salesforce as related records and links.
- A full set of reports is also provided.

Use their List Wizard to build a target list based on State, committee membership, staff position, and staffer issue responsibility.

Pricing Overview

KnowWho publishes pricing for each level of government. Please visit their site for their current pricing, and keep in mind that a 5-seat minimum is required. Their sales team shared the following information with us, but you'll want to contact them for your own quote:

- Federal Contact Directory $1,999/year per user
- Federal Zip-to-District matching $1,999/year for 10,000 credits
- State Contact Directory $1,999/year per user
- State Zip-to-District matching $1,999/year for 10,000 credits
- Local Contact Directory $1,999/year per user
- Local Zip-to-District matching $1,999/year for 10,000 credits

The 5-seat minimum may be spread across products if needed. So you could purchase 2 licenses for each level, 5 licenses for one level of government, or any other combination that meets or exceeds a total of 5 licenses. Note: Licenses allow you to see KnowWho custom data, but all your Salesforce users will still be able to see standard contact/account data even on KnowWho created accounts/contacts.

Legislative Monitoring is available for an additional $10,000 for Federal, and $15,000 for State legislation.

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Clients that love this product:

KnowWho customers include Sierra Club and the SurfRider Foundation.

Visit them at: KnowWho.com
Check out their YouTube channel for demo videos on seemingly every feature of their product

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New/Mode

Founded in 2016, New/Mode is supported and owned by a network of nonprofit organizations and social impact investors. They provide an open platform for people and organizations working toward a more sustainable, more just world. New/Mode offers a fairly broad advocacy feature set and a suitable Salesforce integration for the price, but keep in mind that pricing is based on the number of actions you have live at one time.

The right fit for you?

New/Mode might meet your needs if:

- You want to take advantage of their unique paths to reach targets, like letters to the editor (LTE)
- You could benefit from their robust Canadian target data
- You're looking to join a community of other campaigners and organizers and could take advantage of the shared knowledge and training this platform provides.

Highlighted Features

New/Mode offers 1-click emails and phone calls, petitions, letters to the editor, tweet storms, and faxes, and can target all levels of government within Canada and the US, federal officials in Australia and the UK, European MEPs, as well as any custom target. You can also use a Google Sheet to randomize a set of custom targets on an action.

New/Mode has an online portal where you build embeddable actions using their templates and customizable themes. Special features include:

- Supporter information is pre-filled via browser cookies when they have previously filled out *any* organization's New/Mode form, or via query strings you build into your links.
- Social sharing is optimized and tracked via a ShareProgress integration.
- Catch and Release - so you can control the flow of submitted emails and LTEs by choosing to send them instantly or hold them for staff review for a single delivery.
- Their click-to-tools offer randomized content (subject lines, letter or post content, etc), all of which can be customized by action takers.
- Conditional targeting - creates conditional content depending on the target's current vote or position, so your supporters get an appropriate script for the given situation.
- Automated SMS thank yous - for completed calls.

- [Click-to-LTE](#) - makes it possible for voters to share their concerns with five or more local publications in under a minute. Media outlets closest to your supporter's address are targeted, or supporters can search for specific publications.
- [Click-to-fax](#) - for hard-to-reach custom targets like corporations or unresponsive electeds.

Salesforce Integration Overview

New/Mode syncs supporter data to Salesforce standard objects:

- Supporters become Contacts or Leads, with some upsert matching rule options.
- Action pages built in New/Mode's portal become Campaigns and action takers become Campaign Members.

The sync is one-way (N/M→SF), but you can manually upload/update records from Salesforce to New/Mode with a bulk import tool.

New/Mode provides a default set of mapped fields that includes standard contact info, and you can add custom field mappings. You can also sync data not originating from a form input, like analytical data and system fields.

There is limited CRM functionality on the New/Mode side, and each form syncs with its own mapping defined on a form-by-form basis.

Pricing Overview

New/Mode offers annual and monthly plans dependent on the features you'd like to use. Their pricing is not currently made publicly available, but their sales team shared the following information with us. Please contact them for your own quote:

- **Digital Advocate** - $1,544.40/annually or $167.70/monthly CAD includes targeted emails and petitions, 1 live action, and limited support.
- **Campaign Builder** - $5,444.40/annually or $557.70/monthly CAD includes their full civic engagement suite of tools, up to 3 live actions, google analytics, and an improved support package.
- **Organization** - $8,096.40/annually or $817/monthly CAD includes the full civic engagement suite, up to 9 live actions, google analytics and custom API, and their priority support package.
- **Network** - $12,994.80/annually or $1,298.70/monthly CAD includes all of the above, but you can launch 10+ live actions.

With any package, you can add an additional live action for $95/month CAD. And discounts may be available for those who are willing to make multi-year commitments, or for those running large-scale or networked and coalition campaigns. Contact New/Mode to discuss specifics, and get your own quote.

Clients that love this product

New/Mode customers include ONE, Amnesty International, Beyond the Bomb, David Suzuki Foundation, 350.Org, and Greenpeace Canada. They feature more groups in their [case studies](#). We have clients using it, too; [let us know](#) if you want to connect.

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Visit them at NewMode.net
Learn more with their marketing video

Soapbox Engage

Soapbox Engage is built specifically for nonprofits using Salesforce by a team with political experience. Soapbox Engage's Actions and Petitions apps allow you to connect your supporters to their officials and track it all from Salesforce. These apps are part of a larger suite of Salesforce-synced apps. They price most tools à la carte, and the tools are very affordable but may lack features for sophisticated campaigns.

The right fit for you?

Soapbox Engage might be for you if:

- Your budget is limited or you are looking for à la carte tools.
- You don't need sophisticated social media tools, email marketing tools, or SMS integration.
- You're interested in an app deeply integrated with NPSP that relies on standard Salesforce objects.
- You're already a Soapbox Engage customer for their other apps.

Highlighted Features

Actions and Petitions are built in Soapbox Engage's action builder. You can customize labels, notifications, and some form layout features, as well as apply custom CSS to match your site. You use your own preferred email and social marketing tools to share actions with your supporters.

A User Integration add-on lets supporters update their own records, including managing donations or purchases (if you are using those apps). Forms can be pre-populated with supporter information, and you control what fields and forms your supporters see, based on Salesforce data.

With Salesforce as your CRM, the other apps in the Soapbox Engage suite can also help you engage your supporters. You can collect donations, manage simple ticketed events or class registrations, provide directories of Salesforce data, offer signup and other simple forms, and open a basic online shop.

They have a responsive support team and are often reachable in the Trailblazer Community. They also offer a Support Site with beginner admins in mind.

Salesforce Integration Overview

Salesforce is central to Soapbox Engage architecture, so the integration is solid and thorough. The staff are highly engaged in the nonprofit Salesforce ecosystem, so they stay current on NPSP developments and behavior. The integration is one-way (SE→SF), not including the User Information add-on. You'll need at least basic admin skills for setup, but they provide detailed instructions.

Soapbox Engage uses only standard objects, with the ability to add unlimited custom fields.

- Actions and Petitions import as Campaigns
- Supporters are upserted as Contacts, and if supporters aren't completely matched to existing Contacts, they are stored as Leads for staff review first.
- Actions are Campaign Members, and fields are added that record Petition comments and a JSON field summarizing action details that a developer could parse into custom fields for you.

Note: Elected officials do not get imported into Salesforce.

More information about the Salesforce integration can be found here.

Pricing Overview

Soapbox Engage products can be purchased à la carte or as a full suite. See their nonprofit pricing page for all the pricing information. They also offer starter packs for quick setup. Here are some of the costs for the relevant tools:

- One-time platform activation of $500
- Petitions App: $708/year
- Actions App: $1,188/year
- US Senate Access (on top of Actions fee): $1,188/year + $0.05/letter sent
- US House members, state officials, US county officials, and largest 100 US city offices, are all included by default.

For example, if you had Petitions and Actions, and were sending 5,000 emails to senators, your cost would be $3,334/year.

Clients that love this product

Soapbox Engage's advocacy app users include Alliance for the Great Lakes, Northern Plains Alliance, and Oregon Environmental Council. We have clients using it, too; let us know if you want to connect.

Visit them at SoapboxEngage.com
Read their case studies
Get a demo of Petitions, Actions, and their other apps
Check out their active YouTube channel
Subscribe to their PUB Crawl newsletter for nonprofit Salesforce users

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Others Worth Considering

There are other advocacy solutions on the market that integrate with Salesforce and are also worth mentioning here. These all-in-one solutions involve custom-built integrations and require professional services to set up. For more information, please contact their teams to discuss your needs:

- [EveryAction](#) is an all-in-one solution for fundraising, advocacy, and volunteer management. With their acquisitions of [Salsa Labs](#), [Mobilize](#), and [ActionKit](#), the EveryAction family of products now represents a large corner of the digital advocacy market. We have found EveryAction's Salesforce integration challenging to work with, but they have other clients who are very happy with it. We recommend you receive a complete demo and connect with current customers before making any purchase decision.

- [Springboard](#) provides a fully-customized solution for fundraising, advocacy, and events for the Salesforce Nonprofit Cloud. The features and benefits of Springboard's advocacy functionality are similarly robust to other platforms in this report, but Springboard is more consulting-ware than a standalone app and isn't designed to be a self-service tool. Instead, you'll partner with Jackson River, the agency that developed Springboard, use their tailored deployment services, and then receive continued support through an ongoing retainer.

The following advocacy solutions offer Salesforce integrations that are still too limited to dive into in this report, but we look forward to learning more as they further develop their integrations in the future:

- [Muster](#) recently announced the launch of their [new Salesforce integration](#). Still in its early stages, it simply keeps contact lists in sync between the two systems (creating missing contacts in each system). But we look forward to learning more as they further develop their integration in the future. In the meantime, they are inviting customer feedback to help guide future iterations of this integration. Contact their team if you'd like to discuss your needs.

- [VoterVoice](#) and other tools in the FiscalNote suite of products replaced CQ Engage. FiscalNote offers many campaign, advocacy, and legislative tools, but the one that integrates with Salesforce is VoterVoice. The integration is currently one-way (SF→VoterVoice) but a bidirectional (VoterVoice←→SF) option is on the roadmap for the full release soon. We look forward to learning more once that feature is fully released.

About Percolator

[Percolator Consulting](#)
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Plenty of technology shops can build you a database or a software application, but our expertise in engagement and mobilization makes us unique. A Percolator project changes the way you interact with and relate to your supporters.

Our development team has all the right Salesforce Developer and Administrator certifications, but we also have deep nonprofit, political, and technical experience. We've built customized CRMs, sophisticated apps, and complex integrations for mission-driven organizations of all sizes. And we're not just experts in Salesforce -- our team has worked with almost every action and donation application on the market.

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Our clients range from the Climate and Clean Energy Equity Fund to the National Young Farmers Coalition to the First Nations Technology Council and over the last ten years we've partnered with more than a hundred nonprofit clients. We believe that getting the right strategy and technology in the right hands can change the world, and it's a job we love. Want to learn more? Read some of our case studies.

Report authors: Paula Berg, Barbara Christensen, Chad Harris, and Karen Uffelman

Thank you to the vendors who gave us demos, supplied materials, and answered many questions.