

PROJECT OBJECTIVES

Given the enormity of this project, it should be split into “tracks.” This will help structure the project, enable division of labor, and ensure we can execute this project on time. A more detailed outline of these objectives is at the end of this memo:

- 1) **Context & Assessment:** This research will evaluate the lay of the land and assess the client and other key players
- 2) **Rationale:** This research will outline the rationale and narrative for why the client is running. This includes two key components:
 - a. Personal Brand & Narrative
 - b. Issues & Positioning
- 3) **Vulnerabilities & Response:** This research will assess the client’s weaknesses and vulnerabilities, along with how to respond to them
- 4) **Targeting:** This research will evaluate what a winning coalition looks like relative to her predecessor – including analysis of base, turnout, and swing groups
- 5) **Subgroup Research:** This research will test key findings from the research (focusing on the “rationale” track) among particular subgroups who may have different priorities such as Latinos, African-Americans, young voters, etc.
- 6) **Launch:** This research will inform the launch of campaign from a practical standpoint testing a variety of collateral (imagery, websites, videos, logos, etc.)

The number of objectives in this research is also complicated by the variety of audiences of interest. Obviously, most of this research will need to happen among both general election and primary election voters. To simplify this program, I recommend identify a common definition of our audiences:

- **General Election Research** will be among likely 2016 voters in 10-14 swing states. Given the early nature of this research and the unclear turnout dynamic for 2016, I recommend conducting research among a very broad group (registered voters with very basic likely vote screeners) to ensure that we cast as wide a net as possible. With a robust sample size, this will mean that for all of our general election research we will be able to look at:
 - o Swing voters
 - o Base voters (this will include a number of “turnout” voters – less enthusiastic Democrats who we can use as a proxy for how we “motivate the base”)
- **Primary Election Research** will be among likely primary voters in early primary election states (exact states TBD). On the quantitative research, I recommend always oversampling Iowa given the importance of that state and also including oversamples in New Hampshire in certain circumstances.

Finally, please note that I recommend against “subgroup” research (i.e. Latino research, youth turnout, etc.) in the *early* stages so we can focus on the big picture. We can introduce that research later in the program once we have some of the broad strategic foundations in place.

RESEARCH DESIGN

We should plan to employ a full suite of research tools to achieve our objectives. I recommend:

Quantitative Research:

- I recommend **Traditional Telephone Survey Research** using landline and cell phone interviewing for rigorous quantitative assessments (e.g. lay of the land, issue positioning, message-testing, targeting, etc.)
- I think we should consider **Online Survey Research** for materials/ad testing, personal branding, and also for some of the message testing (there are some online techniques that allow us to differentiate messages better than traditional telephone research). We should try this for message testing in the first phase and see if it's effective. I've used it on other campaigns and it's helped to supplement phone surveys.
- I recommend **Analytics** based in survey research to answer targeting questions and to allow us to cross tab quantitative research based on turnout segments.

Qualitative Research:

- I recommend **Traditional Focus Groups** for detailed exploration of the candidate's personality, brand, narrative, and vulnerabilities.
- I recommend employing **Online Discussion Boards** throughout the entire project to give us an outlet to explore qualitative research questions throughout this entire project.

Our recommended research specifications, timeline, and budget are included in the accompanying PDF document. This is by no means set in stone and is – of course – subject to change and discussion. The broad month-by-month outline of that document are as follows:

- In December – as soon as possible – I recommend getting started with a telephone survey to inform the **Context & Assessment** track. I also recommend immediately getting started with an online discussion board that I can keep open throughout most of the project – giving us a venue to qualitatively probe on research questions on a moment's notice.
- In January, I recommend doing robust qualitative and quantitative research to inform the **Rationale** track, including dedicated surveys and focus groups on both **Personal Brand & Narrative** and **Issues & Positioning**.
- In February I recommend a robust research program to inform the **Vulnerabilities & Response** track. I also recommend conducting **Subgroup Research** among Latinos, African-Americans, and Young Voters in late February.
- Finally, I recommend wrapping up in early March with a track of the initial telephone survey to answer outstanding questions and refresh the initial assessment prior to launch.

In addition, there are two tangential research projects that are needed to inform practical planning and preparation:

- The **Targeting** track should begin ASAP as it will take one to two months. This will require engaging an analytics firm and having them work in concert with our efforts.
- The **Launch** track – informing website designs, logos, fonts, videos, scripts, imagery, settings, etc. – can also be completed when the personal branding research is complete.

PROJECT OBJECTIVES (DETAILED)

TRACK 1: CONTEXT & ASSESSMENT

1A. Lay of the land (Context)

- a. What do people really care about right now (key that client understand from this what's on people's minds)?
- b. What do they see for America in a post-Obama world?
- c. Who are the good guys and bad guys?

1B. Assessment

- a. What do people think of the client and her family?
- b. What do they know/not know? (Garin research gives some insight into this)
- c. What does "strong leadership" mean for the client?
- d. How is client different from husband and predecessor?
- e. What issues is client associated with?

TRACK 2: RATIONALE

2A. Personal Brand & Narrative

- a. What's her story:
 - i. Who is she? What is her personality/character?
 - ii. What has she accomplished?
 - iii. What about her do voters relate to?
 - iv. **Her story: what specific stories advance her narrative and help her relate to voters?**
- b. Why is she running? Why does she care?
- c. Role of gender
- d. Role of family

2B. Issues & Positioning

- a. Substantively, why is she running? Why does she care?
- b. Whose side is she on?
- c. What does she want to accomplish?
- d. What is her economic vision?
- e. What is her "progressive" vision that makes her invincible in primary and gins up the base?
- f. How do we make campaign substantive – what she'll do, what she stands for, etc. – as opposed to personality-driven? How much does that matter?
- g. Bipartisanship & process?

- h. Thorny issues likely to come
 - i. Immigration
 - ii. Trade
 - iii. Tax reform
 - iv. Education reform

TRACK 3: VULNERABILITIES & RESPONSE

3A. Hits

- a. Understand potency
 - i. Post-2008 hits vs. pre-2008 hits. Evaluate them but also understand how voters react to the idea of “old attacks”
- b. Understand how to manage and respond
- c. Attacks from the left
- d. Attacks tying client to Obama

3B. Empirical data to inform challenging decisions

- a. Continuing role/participation in the foundation—both perceptions, but also how much this matters how bad/damaging it is
- b. Paid speeches (same as above)
- c. Role of husband
- d. Role of daughter

TRACK 4: TARGETING

Targeting questions:

- a. What does the electorate look like? How is it similar different from 2012 and 2014 (this is of particular interest to the client)
- b. What is the winning coalition?
 - i. Who is her base? How is it different from Obama’s? Who is enthused by her candidacy who wasn't with Obama and vice versa?
 - ii. Who is actually persuadable? How is that different from Obama’s?

TRACK 5: SUBGROUPS

Re-evaluate key findings from “Rationale” section with:

- a. Hispanics
- b. African-Americans
- c. Other groups TBD

TRACK 6: LAUNCH

6A. Best foot forward

- a. Best tone
- b. Best topics
- c. Best settings (audiences, physical arrangement of audience, etc.)

6B. Branding and design (to inform web presence)

- a. Fundamental questions
 - i. What image are we projecting? (i.e. Badass/hip? Grandma? Tough leader? Maternal? Historic?)
 - ii. What colors, fonts, imagery should we use?
 - iii. Humor?
- b. Product testing
 - iv. Exploratory logo options
 - v. Launch logo options
 - vi. Exploratory website comps
 - vii. Launch website comps
 - viii. Exploratory video scripts
 - ix. Exploratory videos drafts
 - x. Launch video scripts
 - xi. Launch video drafts

6C. How should the client launch the campaign?

- a. Tone/format/story
 - xii. Listening tour (client preference)?
- b. Locations/people