

USE EMS TO ENHANCE YOUR SCALE TO WIN TEXTING

This guide focuses on texting with Scale to Win (STW) Text using EMS to select the best textable phone number, create trackable short links, and/or deliver custom messages to multiple audiences in one campaign. Users must have an Active STW account and a VAN profile code of 1, 2, or 3.

1. Plan the Campaign

- 1a. Work with the county DEC to define the target audience, objective, and the ask. (e.g., text all Democrats in the county with textable phone numbers who are not enrolled in Vote by Mail to ask them to enroll or re-enroll)
- 1b. Collect the following information and submit to county chairperson for approval:
 - Description of the intended recipients and projected numbers determined from the summary of the texting LIST in VAN
 - Proposed text message and the number of characters in each message
 - Cost
 - 1.15 cents/recipient for each 153-character segment sent SMS;
 - single segment texts can be 160 characters – after first segment it becomes 153 per segment;
 - if your text contains an image or a symbol like an accent tilde it must be sent at 70 characters per segment MMS= 3.375 cents and that allows 1600 characters.
 - Confirm the launch date and time, duration of the campaign and the end date.
- 1c. Finalize messages, survey questions and answers, response scripts, and tags to record the results of each conversation. Record the full url for any websites you want to link to, save any digital materials on your computer to upload to EMS.

Text messages should

- Address voter by name - Hi Dave!
- Identify organization sending the text (Lee Dems here)
- Provide required opt-out option (STOP to Opt-Out)
- Provide information and always an ASK (action)
 - Link to Supervisor of Elections – to enroll in Vote by Mail
 - Question – Will you enroll? Will you vote in November?

- 1d. Create Tags and Response Scripts to go with each text campaign.

Standard tags are:

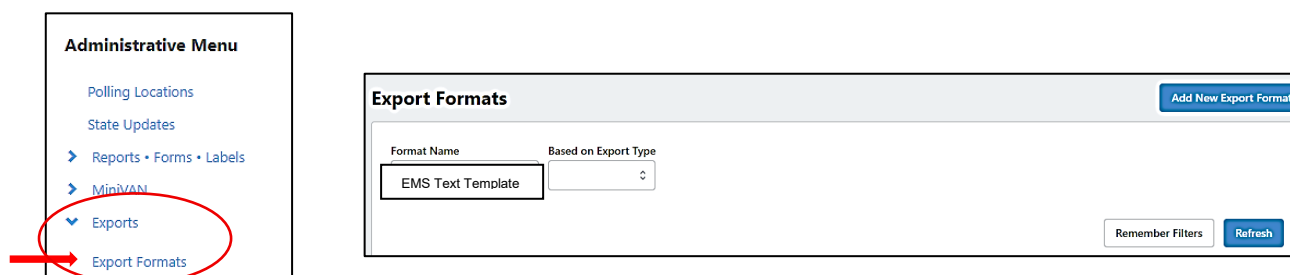
wrong number	moved	confirmed ID	hostile
volunteer	deceased	not supporting Dems	

Response Scripts tell texters what to text back if a voter replies. Some will be standard; others will be campaign-specific. Each Response Script can have an “auto-tag” attached. *These tags automatically go back into VAN as canvass results, activist codes, or survey question answers after the campaign*

2. In VAN, Create Survey Question, Create EMS Texting Template

2a. If there is a survey question in the script, add the question and responses.

2b. In VAN, set up a one-time EMS Texting Template as an Export Format. Click Exports =>Export Formats in the Administrative Menu. Click Add New Export Format and select all the VAN fields to export (see list below). SAVE.



The EMS Texting Template should include the following elements:

- | | |
|--------------------|------------------------------------|
| • Voter File VANID | • County |
| • StateFileID | • County ID |
| • Name | • Precinct |
| • Cell Phone | • Legislative Districts |
| • CellPhoneIsCell | • Voting Address (separate fields) |
| • Home Phone | • Ballot Zip |
| • HomePhoneIsCell | • Race/Ethnicity |
| • Date of Birth | • Source File Sex |
| • Age | • Party |

For efficiency, include ALL fields potentially needed for texting campaigns even if all fields are not needed in every campaign.

3. Create or Edit a Search and Export VAN Voter List and Phone Type List

3a. Create your targeted List of Voters to be texted.

3b. Submit your list for export. Once the export is approved (takes minutes to a couple of days), download the file. Select the EMS Text Export Template and click Custom Export. Save as a .csv file and label with the campaign name, voter, date. (e.g., VBM reenroll voter 3-12-25), Save in an easy to find folder.

Export a 2nd time using the Phone Type List template to allow EMS to select the “best” number for texting. Save as a .csv file and label clearly (e.g., VBM reenroll phones 3-12-25)

Note: Export function requires VAN profile 1A, 1, 2, or 3. Otherwise it is not visible.


Example of an Exported Phone Type List

Voter File	PhoneType	PhoneDev	PhoneSou	PhoneNum	IsCell	DateCreated	OptInStatus
5453257	Home	Unknown	Vendor	2.4E+09	Likely Not a Cell	5/30/2018	Unknown
5453257	Home	Unknown	Vendor	2.39E+09	Likely Cell	11/22/2019	Unknown
5453257	Home	Unknown	Vendor	2.39E+09	Likely Not a Cell	9/19/2013	Unknown
5453257	Cell	Cell	Vendor	2.4E+09	Verified Cell	4/21/2020	Opt Out

4. Use EMS to Create the Campaign and Scale to Win Input File

<https://fldems.us/EMS> (contact Renard Biltgen for access at rbiltgen@me.com)

Login and go to the EMS Home Page.





Enhanced Messaging Services


Targeted Message Support for Text and Email

Welcom

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Operational Functions for Florida Democratic Party


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Campaign Preparation -----

Manage local repositories. Upload digital content, links to other pages, alternate messages. Create Landing Pages for local content repository.

Establish Campaign codes for collecting statistics, view current status, download results, and reset campaign logs.

Converts a voter file to a Spoke or email service compatible format. Enhancements include:

- Selecting best phone number (if text campaign)
- Filter data based on voter demographics
- Adds links to EMS content

Pre-processor a standard VAN export file and add/modify a Slate Card identifier column. Requires Slate Card identifiers from VAT Slate Card Identification process. This is an alternative to creating and maintaining a Slate Card survey question in VAN.

Post Campaign Functions -----

View current campaign status, download results, and reset campaign logs.

Creates a list of voters who clicked a link (Hot Target) during a prior campaign. The list is formatted as an original VAN export file that can be re-processed thru EMS or uploaded to VAN to create a list of Hot Targets. Useful for follow-up campaigns to interested voters.

Analyse text failures in ML-Spoke campaign, validates phone numbers against Phone Validator, and prepares VAN metadata update files.

Administrative Functions -----

Administrative Functions include management of registered users, Global Repositories, and/or organizations.

4a. If using trackable short links in your text message: **add redirect links** like your Supervisor of Elections or county DEC website. Go to Digital Content=>Local Redirect. Assign a 2-character code, title, and enter the full url. Save Link. Check that the link works after saving. Note title for later.

Enhanced Messaging Services
Targeted Message Support for Text and Email

DigitalContent Welcome

Florida Democratic Party
Redirect Link Maintenance for Lee County DEC

Code	Description
DV	DEC Volunteer signup page
E1	VBM Address Change Procedure
EV	Lee County Early Voting Sites
G1	Florida online voter registration system
G2	Find Florida County SOE
G3	Update voter info in other state
G4	Lee County SOE Check My Voter Info
G5	DOS Find My Supervisor

File Upload View Details

Code: E2

Description: Lee County SOE for Update My Voter Record

Redirect Link: https://www.lee.vote/Voter-Resources/Update-my-Voter-Registration-Information

SAVE Link CLEAR Fields

4b. If you want to include **digital images** in your text message or landing page, click on **Digital Content** and ADD images. (For slate cards, see separate slate card instructions that explain how to bulk upload those images.)

- To **VIEW** existing digital material in the library, click the content description in the left-hand column. Then click Display Image.
- To **ADD digital material** (jpeg, png): Click Digital Content <Local Content. Assign a two-character code and description (plan codes and naming conventions for ease of finding materials later). Select the digital material file stored on your computer. Upload and **SAVE**.

Enhanced Messaging Services
Targeted Message Support for Text and Email

Home / DigitalContent Welcome

Florida Democratic Party
Local Content Maintenance for Lee County DEC

Code	Description
A1	Abortion - Young Women
A2	Abortion - Mothers
A3	Abortion - Grandmothers
E1	EMS Pilot Image 1
E2	EMS Pilot Image 2
E3	EMS Pilot Image 3
G1	Gas Prices 1
G2	Gas Prices 2

File Upload View Details

Code:

Description:

File To Upload: Choose File No file chosen

UPLOAD FILE CLEAR Fields

4c. If using **short links that track the response of each voter**, return to the Home page, click on **EMS Campaigns**. Assign a one-character campaign ID code and description. Enter start and end dates for the campaign and the name or initials of the person updating the campaign information. Click Save/Update

Enhanced Messaging Services

Targeted Message Support for Text and Email

Home
Welcome: Susan Westbrook

Florida Democratic Party

Defined Campaigns for Lee County DEC

Code	Description	Total Clicks
0	Default Campaign (No Tracking)	0
A	A - Pilot Project	7728
B	VBM Re-Register	2413
C	Hispanic VBM Outreach Campaign	34
D	Hispanic Outreach Test 2	53
R	VBM General Enrollment Link	8

Code

Description

Start Date

End Date

Modified By

Modified Date

Link Request Activity

No activity yet.

4d. To send targeted messages to different audiences in one campaign you need to use one additional feature of EMS: Digital Content => Local Messages

- To add local messages (dynamic content substitutions for different target audiences), assign a two-character code and description. Type the message in the text box. Save Message. You can update previous messages or delete later. The following example shows a targeted message for school board district 1, 4, and 5. You can see S1, S2, S3, S4, and S5 have different messages for candidates specific to different school board districts.

Enhanced Messaging Services

Targeted Message Support for Text and Email

Home
Welcome: Susan Westbrook

Florida Democratic Party

Local Messages Maintenance for Lee County DEC

Code	Description
A1	AbortionMessage-YoungWomen
A2	AbortionMessage-Mothers
A3	AbortionMessage-Grandmother
E1	AACampaign-NewEnroll
E2	AACampaign-Re-Enroll
E3	AACampaign-MoreInfo
H1	HispanicVBMReEnrollHook
H2	HispanicVBMNewEnrollHook
H3	HispanicVBMReEnrollInfo
H4	HispanicVBMNewEnrollInfo
NV	You can vote for NPAs
S1	SB District 1, 4, 5 DEM
S2	SB District 2 DEM
S3	SB District 3 DEM
S4	SB District 1, 4, 5 NPA
S5	SB District 2 NPA
S6	SB District 3 NPA

Code

Description

Modified By

Modified Date

Message Text

Please vote for SHERIDAN CHESTER in School Board District 7.

5. Prepare the Voter File for Scale to Win

5a. Click on **Voter File Enhancement**

Select "Text Campaign File" in the first dialogue box. Select the .csv VAN Voter Data File saved on your computer. If you also exported a Phone Type list file from VAN, select that .csv file as your Phone List. Click Start Upload. Recheck the required elements/headers listed in the Appendix if it does not load. Hint: to prevent an error

when selecting the file for uploading, name both files with: campaign name_voter(or phone)_date.

Dynamic Link Enhancement Utility for Lee County DEC

Select and upload a Voter data file to be processed. The selected file must have the '.csv' extension and contain fields appropriate to the type of processing (Spoke Text or Email) selected. A list of mandatory data columns can be found here: [Voter File Requirements](#). Additional fields may be required for Dynamic Message selection.

Process this file as a Spoke Text File

Voter Data File: Choose File No file chosen

Phone List (Optional): Choose File No file chosen

Start Upload

5b. After the upload is complete, *if you have no redirect links*, on the Dynamic Link screen, select “Default Campaign no tracking” and click on Convert File with no EMS columns.

Dynamic Link Enhancement Utility for Lee County DEC

Select Campaign: A campaign is required to capture clicks on Short URL links (if used).
NOTE: The Default campaign ('0') will not capture voter clicks and/or voter tracking information.

Select Campaign: 0) Default Campaign (No Tracking)

Add EMS column(s) to the Spoke output file. An EMS column will contain either URL links or plain text messages. Selection of which link or message will be determined by the demographics of the voter.

URL links can either deliver content (stored in the EMS repository) or redirect the voter to a web site. Plain text messages are used to replace/insert content in the body of a text message or email.

Add EMS Columns: Add Columns

Option: Convert file with no additional EMS column(s). Convert File with no EMS Columns

The next page has statistics about your file and the option to download. Save as .csv and you are ready to upload to Scale to Win.

Dynamic Link Enhancement Utility for Lee County DEC

Voter Records: 235 Valid Records: 230 Invalid Records: 5
No Valid Cell: 0 Duplicate Numbers: 5 No Matching Link: 0

Phone list not uploaded. Selecting phones from VAN export file.
Total Phone Cnt: 339 Usable: 339 Not usable: 0
Usable Phones - PDT Cells: 0 Verified Cells: 184 Questionable Cells: 155
Not Usable Phones - Not Cells: 0 Landlines: 0 Opt Outs: 0
Primary Phones: 226 Alt Phones: 4


[Download the processed voter data file](#)

5c. If you have redirect links or trackable redirect links

Select the campaign code created for this texting campaign, then click Add Columns.


Florida Democratic Executive Committee Dynamic Link Enhancement Utility for Lee County DEC


Select Campaign: A campaign is required to capture clicks on Short URL links (if used).
NOTE: The Default campaign ('0') will not capture voter clicks and/or voter tracking information.

Select Campaign: (B) Lee VBM Re-enroll 

Add EMS column(s) to the output file. An EMS column will contain either URL links or plain text messages. Selection of which link or message will be determined by the demographics of the voter.

URL links can either deliver content (stored in the EMS repository) or redirect the voter to a web site. Plain text messages are used to replace/insert content in the body of a text message or email.

Add EMS Columns: Add Columns 

Option: Convert file with no additional EMS column(s). Convert File 

This takes you to the Target Message by Demographic Values screen.

For inserting a column with a trackable redirect link:

Basis for Targeting = Voter Demographics

Track Voter ID = Yes if you want to see which voters click your redirect link

Select Content = Local Redirect

Redirect Link = select the link you want included in your text message from Step 4a.

If you are sending the same message to each recipient, select one demographic criterion (e.g, gender was used in the example below) and click all the options.


Click Save Current Definition and you will see it appear on the Content Menu.




When finished with all your “definitions” click DONE – Convert File.

Target Message by Demographic Values for N) Lee VBM New Enroll


Dynamic Content for Current Link


Link	Content Type	Description/Criteria
No content links have been defined		

1. Choose Basis for Targeting: Voter Demographics
2. Track Voter ID: ☒ Yes ☐ No
3. Description: Voter Demographics 
- 4.a Select Content (Voter Demographics only)


Content Type: Local Redirect 
 Redirect Link: (G4) Lee County SOE Check My Voter Info 
- 4.b Choose Criteria (Voter Demographics only) 

☒ Gender

Gender
☒ F 
☒ M
☒ U

Save Current Definition 
Start a New EMS Column

No Links have been defined

DONE - Convert File 

5d. If you are **targeting different audiences**, select your campaign code, click add column. On the Target Message by Demographic Values screen
 Basis for Targeting = Voter Demographics
 Track Voter ID = Yes if you want to track which voters click your redirect link
 Select Content = Local Messages
 Choose the grouping criteria FOR EACH MESSAGE – e.g. age, gender, slate card ID
 Click Save Current Definition and you will see it appear on the Content Menu.
 Repeat for each target group and the related message.
 When finished with all your “definitions” click DONE – Convert File.

If you did everything correctly it should be ready to go into SPOKE and look like this:

external	lastName	firstName	StateFileID	City	State	Zip	Precinct Name	cell	source	IsCell	UserDefined	EMS_Msg1	EMS_Link2
32578123	AAAA	RRR	122010203	Coco	FL	34000	888	9732715555	C	Verified Cell	NewEnroll	DeSantis just signed...	fldems.us/ckTVM@5icfz
32432456	BBBB	SSS	123010204	Coco	FL	34000	888	2396945555	H	Likely Not a Cell	ReEnroll	Your Vote By Mail has expired. DeSantis just...	fldems.us/ckTVM@kwsit
33356134	CCCC	TTT	124010207	Coco	FL	34000	888	6093515555	C	Verified Cell	ReEnroll	Your Vote By Mail has expired. DeSantis just...	fldems.us/ckTVM@lv0ik
33546768	DDDD	NNN	125010208	Coco	FL	34000	888	7103515555	C	Verified Cell	NewEnroll	DeSantis just signed...	fldems.us/ckTVM@m8mj

This example uses different messages for voters previously enrolled and voters NEVER enrolled in Vote by Mail {EMS_Msg1} but uses the same redirect link {EMS_Link2} to the SOE. Note the tracking code for each voter after the @. A User Defined variable was created using an Excel formula (enroll first time vs reenroll) based on the VAN voter data and that variable (E or R) was included in the VAN voter file that was fed into EMS.

Your voter file is ready to be used as the Contact List to upload into Scale to Win. After the campaign runs you can check back in EMS to see how many voters clicked the redirect link. You can download the RAW DATA to upload into VAN and create a follow-up phone bank for those who clicked but did not enroll in VBM.

Activity for VBM New Enroll					
URI	Description	Tracking Data	Hits	First Hit	Last Hit
cKNVX	Direct link to Lee VBM Enroll - Initial Text	YES	364	03-28 12:52:30	04-04 15:31:23
cKNVC	Direct link to Lee VBM Enroll - Canned Response	NO	1	03-28 14:49:23	03-28 14:49:23

Download Activity [Raw Data](#) [Hourly Intervals](#) [Daily Intervals](#)

After the campaign is complete, retrieve the campaign results from Scale to Win and format for uploading to VAN using EMS “Campaign Analysis.” See separate instructions.

Appendix I – Sample SMS and MMS Messages

SMS to ONE Target Group

Hi {firstName}, Lee Dems here. Your voter status is "inactive" - your voice may not be heard! Do you still live in Lee County? **STOP 2 End** (137 characters=1 segment)

Hi {firstName}, Lee Dems here. Are you interested in protecting a woman's right to choose, LGBTQ+ rights, fighting racism and addressing gun violence? Help protect democracy and win this election by volunteering - click {EMS_Link1} to see how you could best help! **Stop ToEnd** (2 segments)

Hi {firstName}, Hey Florida here. How do you feel toward Donald Trump? 1) favorable, 2) unfavorable, or 3) no opinion. **STOP to End**

MMS Message to ONE Target Group

What you enter into Spoke:

{firstName}, Lee Dems here. Voting by mail is safe and convenient. Read your ballot from the comfort of your own home! It's insurance if things happen and you can't get to the polls in person. Click here now to sign up: {EMS_Link1}

Track Your Ballot Online

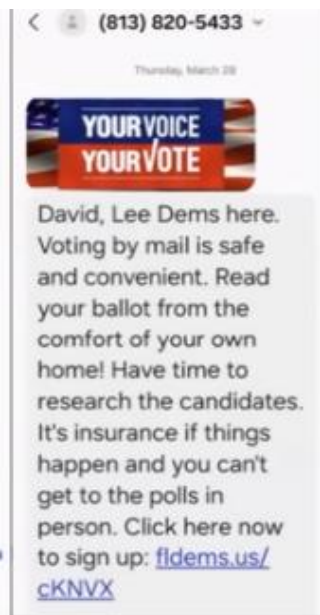
You can follow your ballot online all the way through the voting process. You will see when it is mailed to you, received, verified and counted.

<...several more paragraphs...>

STOP to END

[<https://fldems.us/RawImages/YourVoteMatters.jpg>]

What the recipient sees:



Appendix 2 – Sample Canned Responses and Tags

	A	B	C	D	E
1	Title	Text	Tags		
2	A. WRONG NUMBER	Thanks for letting us know, we will opt this number out of receiving further messages.	Wrong Number		
3	B. MOVED OUT OF FLORIDA	At your convenience, please call the Lee Elections Office at 239-533-8683 to let them	Moved Outside Florida		
4	C. MOVED WITHIN FLORIDA	You can update your Florida address at this link https://fldems.us/ck0G1 or call your k	Moved Within Florida		
5	D. MOVED (AMBIGUOUS)	Do you still live in Florida?	Moved		
6	E. NOT SUPPORTING DEMS/TRUMP/GOP/MA	Just to confirm that we have a correct number, is this {firstName} {lastName}?	Not Supporting Dems		
7	F. HOSTILE/VULGAR/ABUSIVE	Just to confirm that we have a correct number, is this {firstName} {lastName}?	Hostile		
8	G. CONFIRMED VOTER IDENTITY	Thank you.	Confirmed ID		
9	H. POTENTIAL WRONG NUMBER/VERIFY VO	Just to confirm that we have a correct number, is this {firstName} {lastName}?			
10	I. DECEASED	Sorry for your loss. We will remove this name from our list.	Deceased		
11	J. HOW CAN I VOLUNTEER?	Please go to www.leecountydems.org/get-involved-2/ and sign up!	Volunteer		
12	K. I AM NOT IN FLORIDA FOR THE SEASON,	There are many volunteer activities that can be done from anywhere - joining a phone	Volunteer		
13	L. OFF TOPIC	Thank you for your response. Have a good day.			
14	M. I HAVE REPEATEDLY ASKED YOU TO DEL	We will opt this number out from receiving texts from the Lee Democratic Party. Several organizations with whom we are not connected, including			
15	N. Who are you? / Why are you texting me? / W	We are volunteers from Lee County (FL) Democrats. Your info was provided by the Lee County Supervisor of Elections identifying {firstName} {la			
16	O. What is "Lee DEC"?	Lee DEC is the Democratic Party of Lee County, Florida.			
17					