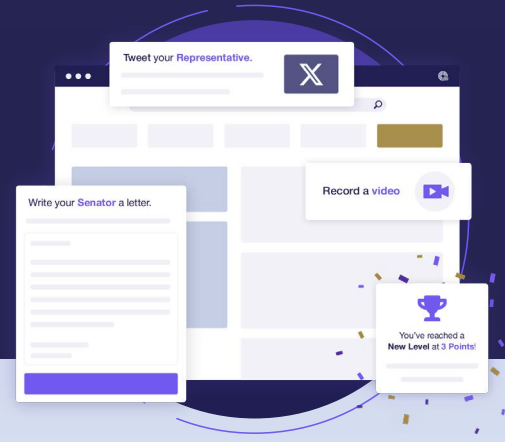# Quorum

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Step 1 | **Define Your Advocacy Goals**

Primary Goals & Campaign Focus

Influence specific legislation

— Which levels of government are relevant (federal, state, local)?

_____

_____

— List the legislative or regulatory priorities you have for the next 12–18 months.

_____

_____

Expand grassroots reach

— Do you plan to grow your supporter base by a certain percentage this year?
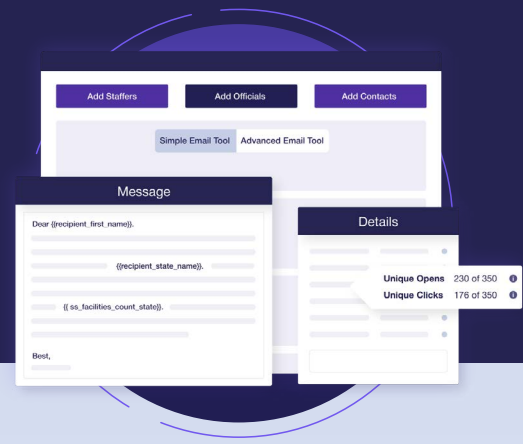
_____

_____

— Which channels are you using (email, text, social, in-person events)?

_____

_____

Increase supporter engagement

— Are you looking for new ways to mobilize advocates
(e.g. texting, AI-personalized messages)?

_____

_____

— Which current tactics do you want to improve?

_____

_____

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Step 1 · **Define Your Advocacy Goals**

Increase supporter engagement

— Are you looking for new ways to mobilize advocates
(e.g. texting, AI-personalized messages)?

_____

_____

— Which current tactics do you want to improve?

_____

_____

Demonstrate measurable impact

— Who do you need to report to (board, donors, coalition partners)?

_____

_____

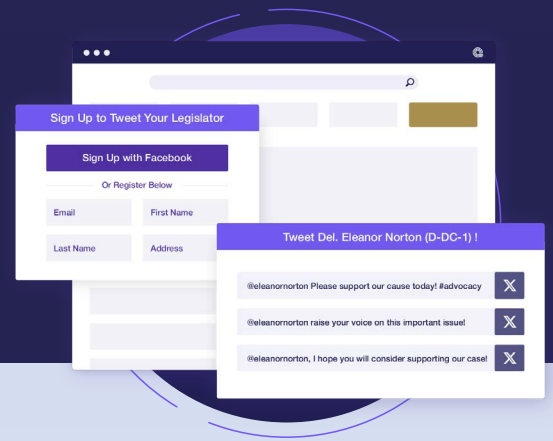— What specific metrics matter most (messages sent, advocates acquired, policy outcomes)?

_____

_____

YOUR TOP 1–3 GOALS

1 _____

2 _____

3 _____

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Step 2   **Assess Current Pain Points**

Check which advocacy challenges you face most often:

○ **Limited internal capacity:**
Not enough staff/volunteers to manage complex or manual advocacy tasks.

○ **Difficult measuring/communicating impact:**
Struggle tying supporter actions to policy wins.

○ **Software complexity:**
Your current tool has too many bells and whistles (or isn't user-friendly).

○ **Integration gaps:**
Data silos between CRM/fundraising and advocacy software.

○ **Poor deliverability or personalization:**
Messages to legislators feel like cookie-cutter form letters.

○ **Lack of training/support:**
Past vendors weren't responsive, leaving your team undertrained.

○ **Budget constraints:**
Hard to justify or afford robust solutions.

○ **Limited scalability:**
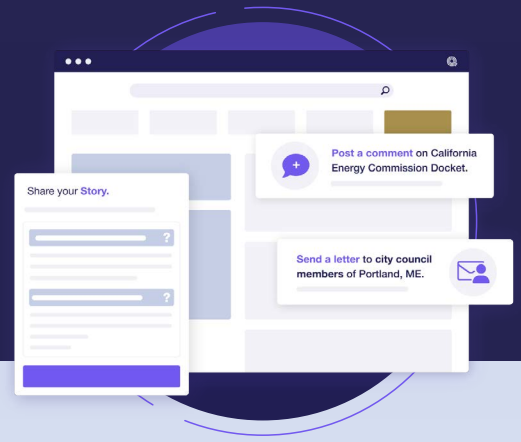Can't easily handle new campaigns, higher volumes, or advanced features.

NOTES on your top pain points:

1

2

3

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Below is a checklist of must-have and nice-to-have features. Tick the boxes that matter most to your organization. Add any custom needs under "Other."

Grassroots Advocacy Tools

- ○ Targeted "email your rep" or "click-to-call"
- ○ Petitions / sign-on letters
- ○ Text messaging (broadcast and/or peer-to-peer)
- ○ Pre-built landing pages (drag-and-drop campaign editor)
- ○ Video message submission / personal story collection
- ○ Social media integration (tweet @ officials, share campaigns)
- ○ AI-powered personalization / message variation

Legislative Tracking

- ○ Federal-level bill tracking and alerts
- ○ State-level tracking (1+ states or all 50)
- ○ Local-level tracking (municipal ordinances)
- ○ Real-time updates on committee hearings
- ○ Automated alerts or daily/weekly digests
- ○ Ability to save and filter priority bills

Stakeholder Management

- ○ Central database of officials & their staff
- ○ Contact history (meetings, emails, phone calls)
- ○ District matching for advocates & officials
- ○ Tools to map influencer relationships / grasstops advocates
- ○ Supporter "scoring" or tiering (super-advocates)

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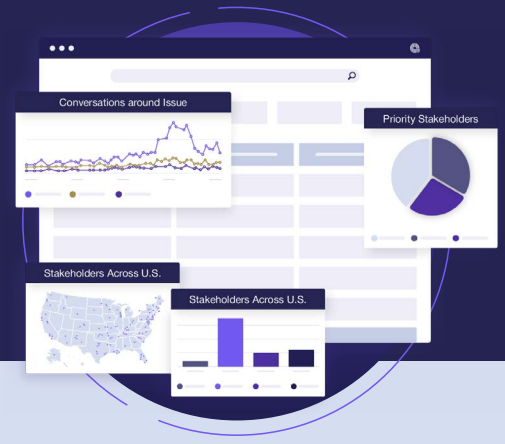
Step 3   **Key Features & Functional Needs**

Reporting & Analytics

- ◯ Real-time dashboards (actions taken, open rates, etc.)
- ◯ Easily exportable reports (PDF, CSV, etc.)
- ◯ Legislative success metrics (co-sponsors, vote outcomes)
- ◯ Conversion & engagement tracking (by channel)
- ◯ ROI analysis (e.g., cost per advocate, cost per action)

Integrations

- ◯ Native integration with our CRM (Salesforce, EveryAction, Neon, etc.)
- ◯ Zapier or open API for custom integrations
- ◯ Single sign-on (SSO) compatibility
- ◯ Email marketing platform integration (Mailchimp, Constant Contact, etc.)

Support & Training

- ◯ Dedicated account manager or success coach
- ◯ Onboarding services (setup, data migration)
- ◯ Comprehensive knowledge base or video tutorials
- ◯ Ongoing strategy consulting / best practices

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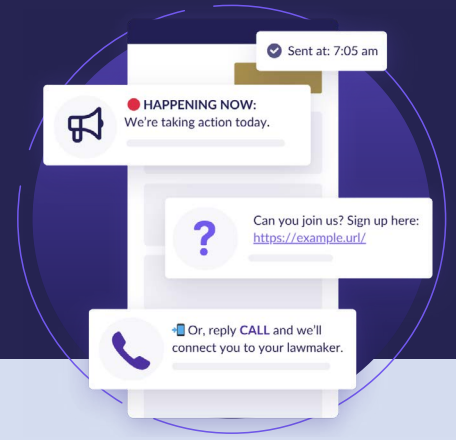
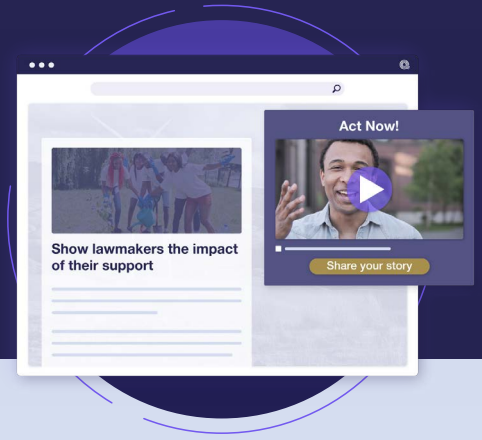**Step 3** **Key Features & Functional Needs**

Other Requirements

- _____
- _____
- _____
- _____
- _____
- _____

NOTES on must-haves vs. nice-to-haves:

1

2

3

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Use this table to rate each vendor (including Quorum) on your main criteria.
Assign a score 1–5 (1 = weak, 5 = strong). Feel free to add rows for extra criteria.

		Quorum	Vendor B	Vendor C	Notes
1	Ease of Use	○	○	○	
2	Grassroots Advocacy Features	○	○	○	
3	Legislative Tracking	○	○	○	
4	Stakeholder Management	○	○	○	
5	Reporting & Analytics	○	○	○	
6	Integration Options	○	○	○	
7	Scalability	○	○	○	
8	Customer Support	○	○	○	
9	Price & Contract Terms	○	○	○	
10	Overall Alignment	○	○	○	

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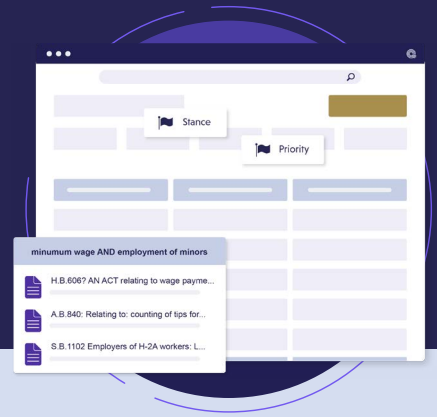
Additional Observations:

Quorum's
(e.g. all-in-one legislative data + grassroots, customer support, integration breadth).

strengths	weaknesses

Vendor B's _____

strengths	weaknesses

Vendor C's _____

strengths	weaknesses

Quorum

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Step 5 — **Budget & ROI Considerations**

Annual Budget

— Budget allocated for advocacy software (license fees + potential usage fees):

$ _____

— Implementation or onboarding cost: $ _____

— Any internal resource/staff cost for rollout: $ _____

Potential ROI Calculations

— **Staff Time Saved:**
Estimate hours saved (on reporting, manual data entry, etc.) if a tool automates tasks.
Assign an approximate hourly cost.

— **Increased Engagement:**
Forecast potential growth in number of advocates, actions taken, or donations tied
to advocacy.

— **Policy Impact:**
Consider intangible or long-term gains from effective legislative wins
(e.g., if a passed bill unlocks funding or advances your mission).

NOTES on ROI or Payback:

1 _____

2 _____

3 _____

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Step 6   **Making the Final Decision**

Demo Debrief

After you demo each solution, jot down key impressions:

Quorum Demo Takeaways

1. _____
_____

2. _____
_____

Vendor B _____ **Demo Takeaways**

1. _____
_____

2. _____
_____

Vendor C _____ **Demo Takeaways**

1. _____
_____

2. _____
_____

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References & Reviews

— Which vendor references spoke directly to your use case?

— Did you find any consistent red flags or praise in user reviews?

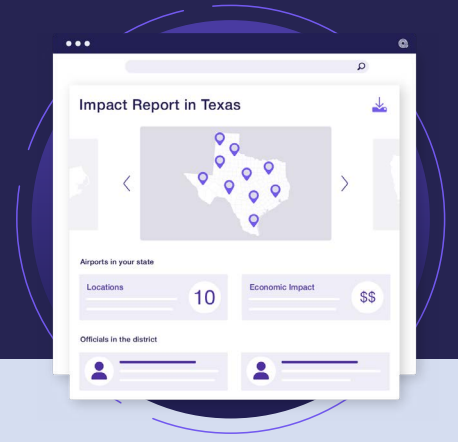### NOTES on references & user reviews:

Top Contenders

List 1–2 frontrunners after your evaluations.

Why do these stand out?

1. _____

   _____

2. _____

   _____

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Step 7 — **Implementation Plan**

Once you select a provider, clarify an implementation timeline and roles. Use the prompts below to make a rollout plan so you hit the ground running.

1. Final Negotiations & Contract

— Target date for signing: _____

— Any special terms, discounts, or add-on modules?

2. Data Migration & Setup

— Who will import existing supporter data?

— Deadline to complete setup: _____

— Need integration with CRM or email platform? If so, by when?

3. Staff Training & Internal Comms

— Who's responsible for scheduling/leading trainings?

— What resources or coaching does the vendor provide?

— How will you communicate new workflows to your team?

4. First Campaign Launch

— Proposed "go-live" date for first advocacy campaign: _____

— Key metrics you'll track (e.g., actions taken, open rates, etc.)?

5. Ongoing Support & Optimization

— Vendor support contact: _____

— Internal champion or admin: _____

— Frequency of check-ins with vendor (monthly/quarterly)?

— Plan to review metrics and adapt strategy?

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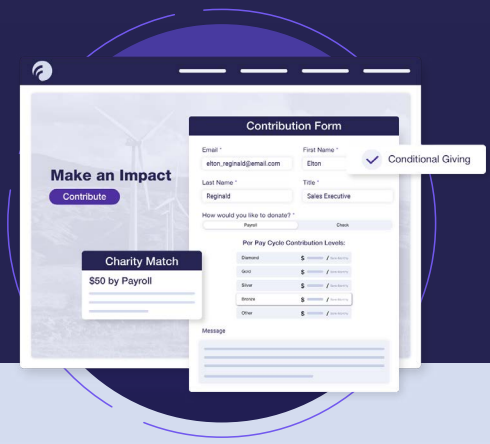
Step 8 — **Next Steps & Key Contacts**

Decision Milestones

— _____ : Final demos completed

— _____ : Internal scoring & discussion

— _____ : Contract negotiation & sign-off

— _____ : Software onboarding starts

— _____ : First campaign launch

Your Vendor Contact Info

— Quorum Contact: [Name, Email, Phone, Meeting Link]
Name : _____
Email : _____
Phone : _____
Meeting : _____
Link : _____

— Vendor B _____ Contact:
Name : _____
Email : _____

— Vendor C _____ Contact: [Name, Email]
Name : _____
Email : _____

Make sure all relevant stakeholders are aligned on these steps—schedule time to share your interactive guide with your leadership or colleagues.

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How Quorum Can Help

While this buying guide is vendor-neutral, we know many nonprofits choose Quorum as a leading public affairs platform because:

— **All-in-One**
Quorum combines legislative tracking, stakeholder engagement, and grassroots advocacy in a single system.

— **Scalability**
Used by large associations and small nonprofits alike, Quorum can grow with your needs.

— **Personalized Outreach**
Next-gen grassroots tools allow for AI-generated message variations, ensuring authentic constituent voices are heard by officials.

— **Robust Support & Training**
Quorum's team offers onboarding, ongoing customer success resources, and expert guidance to maximize your advocacy impact.

If you'd like a tailored walkthrough of how Quorum aligns with your must-have features, we're happy to provide a personalized demo.
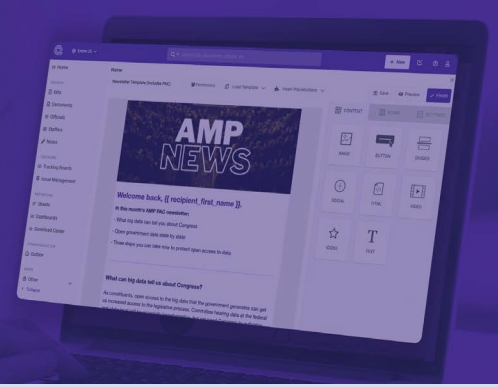
Connect with us at

info@quorum.us

or request a meeting at

quorum.us

Wrap-Up

By completing this interactive guide, you should have a clear picture of:

1. **Your advocacy priorities** (goals, pain points, features needed).

2. **How different vendors compare** on ease of use, integrations, cost, scalability, and support.

3. **Your plan** for implementation and measuring ROI.

Use your filled-out guide to drive **internal conversations,** present recommendations to leadership, and ultimately select the advocacy software that best meets your organization's needs. A thoughtful, data-driven approach ensures you choose a partner that will empower your grassroots campaigns for years to come.

Questions?

If at any stage you need help understanding how Quorum can address your specific requirements, don't hesitate to reach out. We look forward to supporting your advocacy journey!