

# Campaigns & Elections

The magazine for people in politics

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## CONQUERING BALLOT MEASURES

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Issue 308 • January/February 2012

US/Canada \$4.95



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# A Different Way to Test Your Message

The case for applying multivariable testing before settling on a plan of attack.

By Dr. Charles Holland

**M**ultivariable Testing is a statistical tool that can gauge the impact of changes on processes from oil refining to retail sales, and it's the most powerful tool for gaining knowledge I've ever known. But I can't get most political consultants to believe that. In fact, most don't even return my calls.

You can accuse me of hyperbole, but MVT works because it's driven by data. I realize that scares some people, particularly those who have a vested interest in the sanctity of their expertise. Still, the numbers don't lie. We've done some 250,000 experiments with more than 1,000 organizations and have found a nearly inviolable pattern: fully half of suggested changes have no impact, 25 percent have a positive impact, and 25 percent have a negative impact. The constant: no one can consistently guess which changes are going to be in which group.

I founded QualPro after many years as a statistician and division quality manager at the National Nuclear Weapons Complex in Oak Ridge, Tennessee. As a statistician, I rely on complex mathematics to quickly and efficiently solve problems that appear intractable. The term Multivariable Testing was first coined by *Forbes*

magazine, which has studied and reported on it. MVT uses carefully designed statistical experiments to achieve results from small, quick tests involving many variables. We can then take apart the results analytically and isolate what variable or combination of variables caused the effects. The result is a powerful and efficient way to test potential improvements to complex processes and then learn which changes have the most impact.

Despite the potential widespread benefits of the process, the obstacle is that many experts don't want to find out that what they thought they knew is actually wrong, nor do they want to think a mathematical process can replace their expertise. But we use all sorts of tools to hone our understanding and MVT is one that political consultants should embrace. Like scientists who come up with ideas, test them and then revise their theories, consultants should be more effectively testing their own ideas to achieve more consistent outcomes for their clients.

It's why I jumped at the chance to work on a political campaign that appeared to be a lost cause: Tennessee Republican John Ragan's 2010 bid for state House.

## A Campaign Approach

In Ragan's case, he found himself facing a well-funded, four-time Democratic incumbent in state Rep. Jim Hackworth. He was running uphill in a traditionally Democratic district and he was losing. Ragan was polling at just 32 percent, and he didn't have the time or money to turn his campaign around. So Ragan decided to send out one direct mail piece to voters in his district, and it had to be good. He refined his message line by line based on the results of a QualPro-led experiment.

Though I have a strong interest in politics, my opinions and biases were not important in this case, nor are they in the application of our process in any other case. The MVT Process scientifically determines what content catalyzes a respondent's reaction. It doesn't say why something works or even whether it should, only that it does. Our tests generate information about how people respond to various words, images and layouts at a particular time.

In Ragan's case, we were looking at two different mailer formats and testing the display of various pieces of information, including party affiliation and logos; descriptions of Ragan's background, values, and legislative



## Case Study

priorities; quotes and endorsements from other politicians; and selected facts about Tennessee state politics. The mailers weren't flashy and they weren't going to be. It meant that finding the optimal message was key.

We decided to test 15 different variables: the type of card, the use of a follow-up phone call or visit, and 12 variations in the content and look of the mailing. A randomly selected group of 320 likely voters were shown the different variations of the mail pieces.

We lay out these variables in mathematically determined combinations to the right number of subjects. This allows our statisticians to reliably estimate the individual impact of each variable and the impact of different combinations of variables. Thirty-two different versions of the postcards were mailed to the 320 subjects. Telephone polls by a professional survey firm—before and after the mailings—measured the impact of the mailings on the likelihood that recipients would vote for Ragan.

The results on voter intentions as reported by the experiment's subjects were dramatic even as some changes were barely noticeable to a casual observer. For instance, one variable compared a series of "Did you know" statements about illegal aliens to a list of Ragan's attributes, including experience and responsibility. The use of that section seemed to focus voter anger and increase their inclination to vote for Ragan by a few percentage points.

Combining this format with an endorsement from Bill Haslam—the Republican candidate for governor—increased the likelihood of a vote for Ragan by a full 8 percent. Additionally, we found the more expensive self-mailer format had no advantage over a cheap postcard. We did the test mailing, surveying, and analysis for the Ragan campaign in less than five weeks. The optimum mailers were then sent out three times starting the second week of October.

After our tests, we predicted that Ragan would win with 52.8 percent of the

vote. He won with 54 percent. And Ragan got his results for less than \$2 a vote. The Hackworth campaign and the local media were blindsided by the results.

## A Fundraising Approach

Along with message testing, we've seen results in the corporate world using the MVT process to help increase corporate donations and charitable giving in higher education.

One example comes from a large telecommunications firm looking to increase donations to their in-house political action committee. The company wanted to ramp up its PAC efforts in just five months to engage an increasingly competitive landscape, so it asked its PR pros to work with its lobbyists, in a combination not used before, to set up a series of fundraisers and they asked for our help. We tested these on a group of employees invited for the purpose of supporting the PAC but clearly told that their giving decisions were not part of their

**TABLE 1**

A total of 15 factors were tested for the mailers—each with a "current" condition and a "change" condition—to determine the optimal recipe that would move voters to Ragan.

FACTOR NAME	CURRENT	CHANGE
"Did You Know?" Block	No	Yes
Look	Cluttered	Clean
Quote vs. Slogan	Quote	Slogan
Post Card vs. Self Mailer	Post Card	Self Mailer
Website Reference vs. Testimonial	Website	Testimonial
Follow-up Phone Call	No	Yes
Follow-up Visit	No	Yes
Picture	Air Force	Family
Republican Party Emphasis Added	No	Yes
Info List vs. Explanations	Info List	Explanation
Reality Check List Replacement	No	Yes
Address-Side Slogan	Limited	Integrity
Statement Below Return Address	Non Politician	Conservative
Graphics	Yes	No
Demographics	Rural	Urban

performance review.

We involved their public relations professionals and their lobbyists in talking about everything from the location of the event and the style of the invitation, to which refreshments to serve and who the pitchperson should be. The group came up with an initial list of 103 ideas to test. We then whittled that list down to just 19 factors that were easy, fast, and inexpensive to implement. The next step was running the events, which the team did for an entire week straight. Each event tested different combinations of variables on only a small percentage of the employees.

As in Ragan's campaign, many of the findings were counterintuitive. Serving alcohol and suggesting a level of giving both had a negative impact. Having the company lobbyist give the pitch with a basic script, but one they could infuse with a little personality, was actually the most effective. Our efforts in refining their message and their fundraising process helped

## "By testing improvement ideas, we can avoid the hurtful and inconsequential ones."

increase donations by 238 percent, according to their numbers.

We employed the same process in a similar effort for Lincoln Memorial University, which tested 30 ideas involving their mail, email, telephone, and face-to-face solicitations. The experimentation identified a slew of helpful changes in the content, format, and timing of their mail and emails.

In the real world, good ideas are incredibly hard to separate from bad ones, and the benefit of being able to focus only on the good ideas is

tremendous. It's no different in the campaign world. Our experience shows that no one—executives, political consultants, professors, or subject-matter experts—is able to reliably determine which ideas are the helpful ones. By testing dozens of ideas at once, however, and then determining the 25 percent that should be implemented, positive outcomes are highly likely.

It was Mark Twain who said, "The trouble with the world is not that people know too little, but that they know so many things that ain't so."

By testing improvement ideas, we can avoid the hurtful and inconsequential ones. And the results are based on science, not intuition.

*Dr. Charles Holland is CEO and Founder of QualPro, Inc., a Knoxville-based consultancy. The firm has conducted more than 16,000 business improvement projects with more than 1,000 companies, including many of the Fortune 500.*

### ILLUSTRATION 1

Once the optimal mix of message and creative was determined, the bare bones postcard mailer went out to voters in Ragan's district. It was his only mail piece of the campaign.



## John Ragan — A Lifetime of Service and Leadership





**Political Values**

1. The Rule of Law
2. Individual Liberty
3. Limited Government
4. Free Enterprise
5. Fiscal Responsibility
6. Low Taxes
7. Pro-Life
8. Pro-Gun Rights

**Background**

**Experience**

- 24 years in the USAF
- 15 years in the business world

**Leadership**

- Military command
- Corporate management
- Nationwide business consulting
- Small business owner

*"Tennessee needs people like John Ragan in the State House to get things done."*  
*Bill Haslam*

**Did You Know?**

Americans spend over a billion dollars a year just to pay for the services to illegal aliens.

Illegal aliens have turned Phoenix into the kidnap capital of the nation.

Illegal aliens have murdered thousands on American soil.

District 33's current state representative apparently couldn't be bothered to vote or take a public stand on legislation to curb illegal alien crime.



Paid for by the committee to elect Ragan