

HOW TO ORGANIZE A CARROTMOB

Version 1.0



So you want to throw a Carrotmob?

Wonderful, welcome to the movement. Carrotmob is a new model of consumer activism, and this is the chapter in the history book where we all get our hands dirty and pioneer new ways to put this model to use. This is the part where we keep innovating until we have successfully lowered the planet's blood pressure. People are attracted to Carrotmob for different reasons: it's a win-win model; it has measurable results; it's fun; it's simple; it succeeds where many other methods fail. Whatever it is that brought you here, this guide is meant to prepare you to achieve your activism goals and serve as a touchstone for what this movement is all about.



TABLE OF CONTENTS

- PHASE I – CARROTMOB PRINCIPLES 3
- PHASE II – SETTING THE FOUNDATION 5
 - STEP 1: CHECK YOURSELF 5
 - STEP 2: BUILD YOUR TEAM 5
 - STEP 3: MAKING THE BIG DECISIONS 6
 - STEP 4: CONNECT WITH CARROTMOB HQ 7
- PHASE III – GOING LIVE; FINDING AND WORKING WITH A BUSINESS PARTNER..... 8
 - STEP 5: MEDIA AND PUBLICITY 8
 - STEP 6: RECRUITING BUSINESSES TO PARTICIPATE 9
 - STEP 7: BIDDING AND SELECTING YOUR PARTNER 10
 - STEP 8: PLANNING LOGISTICS WITH THE BUSINESS 12
- PHASE IV: THE EVENT & FOLLOW-UP 13
 - STEP 9: THE BIG DAY 13
 - STEP 10: MAINTAINING THE MOMENTUM..... 13
 - CARROTMOB APPENDICES 14

**Green font indicates links to appendices provided to help with planning and executing the Carrotmob event.

PHASE I – CARROTMOB PRINCIPLES

Carrotmob is founded on a few basic principles. Together these principles are the driving force behind why Carrotmob can be such an effective instrument for creating social change. We feel strongly that if you understand these basic principles and apply them while planning your Carrotmob event, you will have a much more meaningful, sustainable impact.

➤ **A Win-Win Situation**

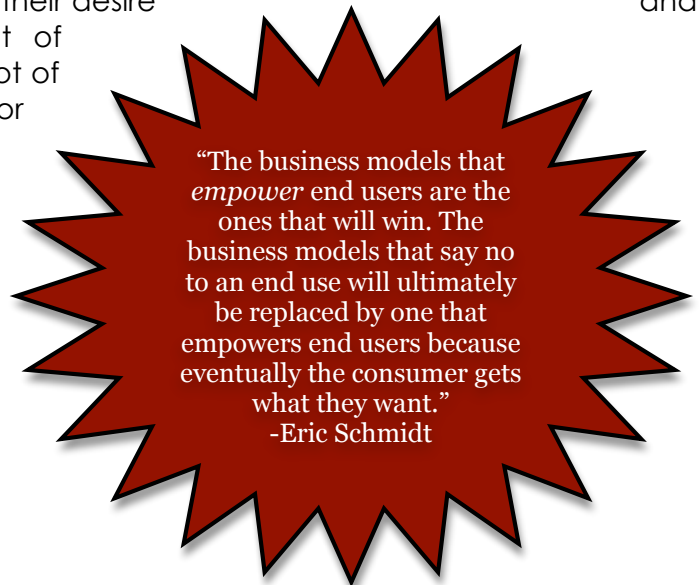
Carrotmob is great because it's a win-win proposition. Businesses win through an increase in profits and improvement to their reputation. Activists win with a new, positive form of activism that can get results that are both measurable and emotionally compelling. The founder of Carrotmob also co-founded a company called [Virgance](#) which today supports Carrotmob, and the commitment to finding win-win models of activism is a core principle of all other Virgance projects as well.

➤ **Educating, Engaging, and Empowering the People**

We envision Carrotmob opening the eyes of mainstream society to the social issues that confront them—and helping them to understand their role in the solutions to these issues. Through this, Carrotmob actually becomes a means of educating society about important social issues. Carrotmob is also a fun, convenient way to get involved, which makes it easy to engage parts of the population that may not have thought of themselves as activists in the past. The broader appeal we have, the more potential buying power we have as a consumer network.

➤ **Harness Existing Economic Forces**

One of the reasons why Carrotmob is such a special model of activism is because it taps into existing incentives—for both consumers and businesses. On the consumer end, Carrotmob simply aligns people's daily consumption with their desire and willingness to contribute to the betterment of society—in a way that doesn't take a whole lot of extra resources from them to do so. For businesses, we accept that they are driven by a need (and in some cases a legal requirement) to maximize their profits. This is why it is usually so difficult for businesses to focus on social goals that don't also make money. Both consumers and businesses have habits that are hard to change. Instead of getting distracted and frustrated trying to change these habits, Carrotmob simply embraces these forces as they are finds mutually beneficial solutions.



➤ **Democracy**

The success and effectiveness of Carrotmob depends on the organizers represent the desires of their community. We feel strongly about being as transparent and democratic as possible as Carrotmob grows and evolves. There are some elements of a campaign that are best planned by a central leader, but we always need to remember that the real power lies with the mob. If any organizers try to ignore the mob, it

won't work. Organizers should embrace the wisdom of crowds. At the same time, don't be paralyzed by a need to have everyone agree on everything.

➤ **Positivity**

Remember, the Carrotmob model works because it's **not** threatening, **not** expensive, **not** time-consuming, **not** uncomfortable, **not** "radical," **not** confusing, and **not** negative. We don't need to pressure or "guilt-trip" anybody into action—whether it's businesses or our fellow citizens. **By focusing on the positive, we will win more and more friends and followers** in business and civic communities. People just naturally enjoy being a part of positive action, and businesses appreciate activism that works with them instead of against them. Some activists don't know what to do with themselves when there's no conflict to escalate, and no enemy to attack. If this sounds like you, there are plenty of existing stick-oriented movements who would probably benefit from your organizing skills more than we would.

➤ **Measurable Results and Improvement**

As fun and engaging as Carrotmob is, we are all about results. We want to continually be measuring our impact, evaluating what could be done better, and working to improve the effectiveness of our model. We don't have time to just watch a documentary film or chant a silly chant and then call it a day. Let's create change that is tangible and measurable.

PHASE II – SETTING THE FOUNDATION

STEP 1: CHECK YOURSELF

Are you sure you want to do this? Just checkin'. Remember that if you do this half-heartedly and hype up an event that ends up belly flopping horribly, the whole movement looks bad. There's plenty of room for mistakes, but we don't have room for laziness or recklessness.

We've had all kinds of people plan amazing Carrotmob events—from enthusiastic high schoolers to experienced professionals—so we're confident you can as well. But all of these Carrotmob Organizers had something in common: they were **committed to seeing their Carrotmob through to its successful end**. Here are some things to consider:

- On average, the full Carrotmob planning process takes at least two months
- Expect to put in at least 4-5 hours a week throughout the process—with longer hours as you approach the Big Day
- Most of the work can be done during your off-hours, but what if you (or someone else on your organizing team) have to make some calls or visits to businesses during business hours?
- What if the first 5 businesses you talk to don't get it and tell you to get lost? Are you going to go home and cry about it? Or will you go and find 5 more businesses to talk to?
- If you haven't done so already, [check out this map](#) to see if there are other campaigns near you...there may be other organizers in your area that you can join up with if you're not ready to start from scratch.

Check out **our sample timeline (Appendix 1)** for an example of what to expect as you get your baby off the ground. So, how do you feel now? Still with us? Splendid.

STEP 2: BUILD YOUR TEAM

Get your Carrotmob team together. Your team is the group of people who will work with you to make your Carrotmob a wild success. You may be able to do great deal of the initial work yourself, but you will need help to execute the event. As you work to put a team together here are some ideas to help you along:

- Quality is better than quantity in this case—**you plus 2-3 superstar friends is an optimal number** for a highly flexible, ultra-productive team of ninjas
- Look for people who are proactive, reliable, organized, personable, well-connected and passionate
- Take a look at the **list of responsibilities (Appendix 2)**. Early on in the process, you

Week 1

-  Read the Carrotmob Guide
-  Read Supporting Documents
-  Step 1: Check Yourself
-  Step 2: Build Your Team



should sit down with your team and clearly define which responsibilities each team member will be responsible for throughout the process. They should also have gone through the "Check Yourself" process to make sure they are committed to the success of the Carrotmob.

- Decide some basic issues like when and how often you'll meet as a team, how you will be accountable to each other, and what your mini-milestones are throughout the process.


STEP 3: MAKING THE BIG DECISIONS


There are some basic decisions early on that will define the rest of the planning process and the nature of the Carrotmob event itself. So it's important to spend adequate time and energy to get these issues right from the start. These basic decisions include:

- **Define the social issue** that will be at the heart of your Carrotmob event. Though the first Carrotmob was based around the environmental issue of energy conservation, the Carrotmob principle can be leveraged to impact all social issues. How? That's something we're relying on you to innovate and figure out. What will you focus on next—Human Rights issues? A living wage? Fair Trade? The options are endless. ***If you have a wild new idea for a type of Carrotmob that has never been done before, get in touch with us early on to make sure we're going to feel comfortable supporting your campaign.***
- **What are the demographics of your target Carrotmobbers?** Are they young, hip, and tech-savvy? Or are they middle-aged parents—firmly rooted in the community? Or perhaps you'll plan a cross-generational event—appealing to a wide range of ages and interests?
- **Decide the type, location, and scope of the businesses** you want to target for the Carrotmob event—businesses that make the most sense with the social issue you want to tackle.
- **When will you hold the event?** You may or may not have to set a date early on, but you should at least think about it. What day of the week might be good, and at what time? The timing of the event can be a big factor in determining how many people will be in attendance. Be sure the winning business owner helps you pick a day & time!
- **What geographic location** will you focus on? Will the competing businesses be close to each other or well separated—or does it matter? Will there be a specific part of the city, or a certain local town that you'd like to focus on?
- **Visualize the tone and feel of the event.** Would people prefer making it rain with Lil' Wayne, or Fair Trade Coffee from Sumatra with Frank Sinatra? This will depend a lot on what type of mobbers you target.

The answers to most of these questions are much easier to come up with once you have a solid understanding of two things:

Week 2

Step 3: Make the Big Decisions

Step 4: Connect w/ HQ

- **Yourself and Your Team**: What are you and your team members most passionate about? Where do you want to make your mark? What initially attracted you to Carrotmob and how do you want to use it to make a difference? What are your time constraints and how ambitious are you?
- **Your Community**: Your fellow Carrotmobbers will come from your community, so it's important to understand what resonates with them. What are the social issues they're most concerned about? What businesses would people be the most excited about Carrotmobbing—both to help them and to create social improvement?

This is a start to making these Big Decisions. We've put a lot of thought into this planning process, so see the supporting document, the **Art of Designing a Carrotmob (Appendix 3)**, for more details on all of these topics.

STEP 4: CONNECT WITH CARROTMOB HQ

All right, give yourself a pat on the back--you've completed a HUGE part of the Carrotmob process. There's still a lot more to come though, and now that you've thought through the major planning points we'd like to connect with you!

We've put together a **Carrotmob Organizer Profile (Appendix 4, an email form)** for you, where you can briefly record basic information about yourself

along with the outcomes from Steps 1 through 3 above—including the names of your teammates, and the basic decisions you've made about your Carrotmob. **Shoot us an email at info@carrotmob.org to let us know you've been planning an event** and we'll send you the profile to fill out electronically. Once you've been able to send the form back to us we'll set up a phone call to discuss the plan, strategize, and provide you with some advice. If things look solid, we'll move from there into Phase III of the planning process. From this point on, we'll be supporting you and doing what we can to make your event as successful as possible. (There's a portion in the FAQ that discusses the relationship between Carrotmob HQ and our Carrotmob Organizers if you're interested in learning more about that.)

On that note, you can go ahead and send your email to Carrotmob HQ, and then treat yourself to a tasty snack and a frosty beverage while you wait for us to write you back.

It is true that economic and social objectives have long been seen as distinct and often competing. But this is a false dichotomy; it represents an increasingly obsolete perspective in a world of open, knowledge-based competition. *Companies do not function in isolation from the society around them.*

- Michael Porter and Mark Kramer, "The Competitive Advantage of Corporate Philanthropy"
HBR, 2002

PHASE III – GOING LIVE; FINDING AND WORKING WITH A BUSINESS PARTNER

STEP 5: MEDIA AND PUBLICITY

All right, now that you've got your basic decisions covered and you've got the green light from Carrotmob HQ it's time to go live! As part of being approved by Carrotmob HQ, you're now an official Carrotmob event and we'll set you up with an official Carrotmob blog to report on your progress, and a Facebook fan page for people to join your event!

You can use these social media tools—as well as other publicity methods—to begin educating people on what Carrotmob is, explaining the importance behind the social issue you're tackling, and garnering support for the big day. Getting the word out about your Carrotmob event is going to be crucial to getting a good turnout at the event, and as such should be a good part of your focus from now until the event. Here's a brief description of a few different media tools (remember that this is far from comprehensive—feel free to be resourceful and creative as you promote your event):

1. **The Blog: This will be your most important media and publicity resource.** You'll be able to give the details of the Carrotmob process step-by-step through posts on the blog and really get people fired up about what you're doing. As you reach out through other media methods, it's important to *direct people to follow your blog*, so they can receive updates on the process. The following are some example blog entries that would definitely be good to post:
 - a. An initial post announcing that a Carrotmob has arrived in your community—this is a good post to describe what Carrotmob is and some history, as well as the issue you've decided to focus on.
 - b. A post introducing your team, and the details of the big decisions you face- such as the specific geographic location you've picked, what type of businesses you'll be focusing on, etc.
 - c. A post letting people know that you're starting to contact businesses, the response you're getting, and especially how the bidding and selection of the winning business will be done.
 - d. A post announcing the results and the winner of the bidding process! Give some background on the business and what they have offered the Carrotmob.

Week 3 to 4



Step 5: Set-up Publicity



Step 6: Recruit Your Business Partner

- Research and Locate Businesses
- Deliver Invitations and Visit Businesses
- Follow-up

- e. A post with the juicy details on the logistics and announcing the Big Day of the event! You can describe here the times, location, date, and process of the whole event, and encourage people to come out.
 - f. A post after the event telling people about the results. Post pictures, video, etc.
2. **Your Facebook Page:** You can post basic information on Carrotmob and the event here. The best use we've found is to make use of the ability to invite all your friends as a way to spread awareness. Then you can direct them to the blog for more information as the event develops.
 3. **Twitter:** A useful tool to send out short little tweets as things heat up, again directing them to blog for the full story and details.
 4. **Sending a press release** to local news sources: Using our **press release template (Appendix 5)**, you can draft up a letter describing your Carrotmob as it gets closer to the actual day. Plan on doing this 2-3 weeks before the event launches.
 5. Posting information on **local community websites:** Once you have the date and other basic information set, you can often find community websites where you can post upcoming events for free.
 6. **Public service radio announcements:** Radio stations will often do public service announcements for free, and as a community-based event they may run a blurb about your Carrotmob. You can use this **radio announcement template as a base for yours (Appendix 6)**.
 7. **Traditional flyers, posters, and signs:** We definitely want to stick with the paperless methods outlined above as much as possible, but having some flyers and/or posters can be helpful with the final marketing drive before the event and the day of. We trust that your judgment and tree-saving sensibilities will guide you on this one.

We hope this helps to get you off to a good start. Your marketing and media should start out light, and increase *a lot* as you get closer to the event so that you have a good turnout. Again, remember that these are just a few methods for getting the word out, feel free to explore and innovate—and tell us about what works for you!

STEP 6: RECRUITING BUSINESSES TO PARTICIPATE

Now that you've got your media strategy up and running, you've decided on the type of businesses you want to target, and you've figured out the geographic location and other important details, it's time to go out and contact these businesses. There are a few basic parts to this process:

- **Research:** Go online and look up your targeted businesses in the location you've decided on. We've provided a **spreadsheet (Appendix 7)** for you to record their information. ***Remember that it's important to get in touch with the owner or general manager- someone with the authority to decide if they will participate in the Carrotmob.

"It is difficult to get a man to understand something when his salary depends upon his not understanding it."

-Upton Sinclair

- **Initial Contact:** With this contact information in hand, it's time to start pitching your Carrotmob event. You'll definitely want to visit with your contact at each business **in-person**, this is by far the most effective way of explaining the Carrotmob concept and getting business owners on-board. Sometimes it may help to first drop off physical "invitations" to prep them for your visit. We've also found it extremely helpful to bring a laptop or even a video iPod in to the store with video footage of another Carrotmob event. This helps business owners envision an event at their store, and explains the concept without you having to talk a mile a minute. You can find other videos on [YouTube](#) and [Vimeo](#) . You might want to try your approach on a couple of businesses first, and improve your pitch before you tackle the whole list. Here is an **invitation letter template that we've put together (Appendix 8)**.
- **Attitude:** There are two Carrotmob principles to emphasize with the businesses— a) the Win-Win concept and that b) Carrotmob is a **POSITIVE** vehicle for change. When you talk with these business owners it's important to understand that if owners really *get* Carrotmob, they should definitely be excited and grateful to have the chance to participate in a Carrotmob. If the event you're planning is true to the Carrotmob principles, the winning business stands to gain in cash, reputation, and satisfaction for making a positive contribution to society. You should be confident of this if you've designed your campaign well, and your confidence should be contagious when you talk to the business.
- Focus on the businesses that are willing to take the time to understand Carrotmob and the value it can bring to them. It's even okay to just focus entirely on the money-making benefit if that's all they're interested in—because at the end of the day, if they change their practices as the winning business then Carrotmob has won! One great thing about Carrotmob is that we *don't have to rely on emotional, moral arguments. Our model is stronger than that*, so don't sweat it if the business doesn't understand or care about your noble motivations.
- This process may not be easy. In the first ever Carrotmob event, Brent dropped off info at 23 different stores, waited a week and didn't hear back from anyone. After following up, he found 5 stores that expressed interest, but only 3 that actually placed bids. Luckily, three was all we needed. Hopefully you will have an easier time now that you can point to successful Carrotmobs of the past, but still, don't get discouraged if this part takes awhile.

STEP 7: BIDDING AND SELECTING YOUR PARTNER

Let the games begin! So now you've convinced a few businesses of the power of Carrotmob and they're ready to compete. You can begin the bidding process. This is one of the most fun parts of the whole campaign!

There are two fundamental ways that we've devised to conduct the bidding and to select a winning business partner: a) our *quantitative* method—where the companies bid based on quantitative metrics of change, such as a percentage of revenues or a dollar amount, and b) our creative, *qualitative* approach in which businesses make different types of offers. In the first

Week 5



Step 7: Bidding and Selection

- Bid Submission
- Coordinate Bids
- Select Winner

case choosing the winner will be as simple as selecting the highest bidder, however, in the second case it makes more sense to have the Carrotmobbers vote for the winner. If you decide to use the voting method, Carrotmob HQ will soon be able to set you up with a slick voting tool that will help you set up an airtight, [U.N. Human Rights Commission-approved fair election](#) (our [second San Francisco Carrotmob](#) is the first example of Instant-Runoff Voting in action for Carrotmob!)

As you'd expect, there's a bit more to each method than we've outlined here, so (yeah, that's right) check out our [bidding doc here \(Appendix 9\)](#) for more details on how to set-up, carryout, and select the winner.

Again, remember that *you may come across a business that disrespects you or the process, or maybe just a business that is obviously not being run in a responsible way*. If you come across this sort of business, you may be tempted to attack them, pull out the stick, write a nasty blog post about them, and so on.

Under no circumstances should you attack any business in any way. If they don't participate, just put your effort into making the event successful for their competition. There are other organizations out there that do a great job of criticizing businesses. Carrotmob needs to be a safe place for businesses. This model works because it's a positive, win-win model, and Carrotmob has no enemies. We just need to be the carrot.

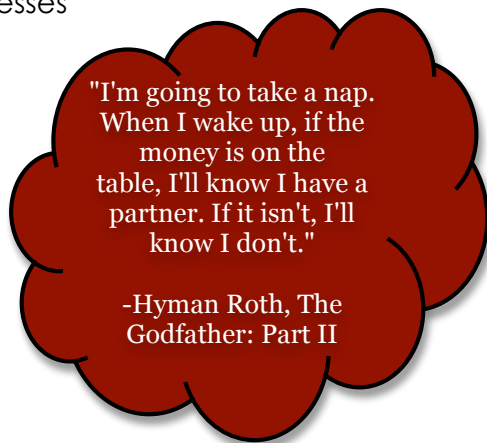
COMPETITION OR REWARD

And here's one final note on the value of competition—a question we came up initially as we developed Carrotmob was whether we should have multiple businesses compete to win the carrot or focus on one business and offer it a simple reward in exchange for taking some specific action. And in the end, let's be honest, we figured out it's way cooler to have businesses compete, because:

- competition will push businesses to make stronger and stronger offers to win
- competition lends legitimacy to the idea that one business can safely be labeled "better" than the rest
- competition adds interesting drama and intrigue to the whole process
- competition, as long as it's transparent, assures everyone that there's no nepotism involved in deciding who will win
- competition is a language that businesses understand and appreciate

Now, there may be some cases where it's appropriate to design your campaign as a simple "tit-for-tat" reward model. For example, if you live in a small town with one grocery store, you could just have a campaign to have them do one thing. But in that situation, the grocery store would already have a monopoly, so it's not a slam dunk argument.

One other point on this topic is that if you are tempted to design your Carrotmob so that there are multiple winners, resist this temptation. Multiple winners will dilute the value of the carrot. It won't work. Stay strong!



STEP 8: PLANNING LOGISTICS WITH THE BUSINESS

Well done, you've selected the winning Carrotmob business!

It's time to get down to the dirty details and start planning with the business to make this event a roaring success. Go ahead and set-up a meeting with your team and the decision maker(s) for the business.

To begin planning with the business, give



them a basic explanation of the preparation that will be needed from now until the

day of the event, as well as what will happen the actual day of the event. The timeline you prepared at the beginning of this process will help illustrate this. You can also begin sorting out you need to do using this **sweet checklist (Appendix 10)**.

Once you've gone through this checklist, it's time to turn the publicity and marketing up a notch as you prepare for the final push to the Big Day. Now that you've got your winning business, it's time to deliver—let's show them the power of the carrot...

Week 6 to 7



Step 8: Preparing for the Big Day

- Plan w/ Winning Business

- Logistic Preparation



Final Push to Get the Word Out!

PHASE IV: THE EVENT & FOLLOW-UP



STEP 9: THE BIG DAY

Honestly, you've taken care of the hard stuff by now. If you and your team have nailed everything up to this point, today should flow nice and easy. It's a good idea to create a master schedule or itinerary of the day that outlines all of the things that need to be done and by whom, and share this with your volunteers. Check out this [sample schedule and the template we've created to get going \(Appendix 11\)](#).

And remember to take lots of video footage and pictures to document your mob making purchases and having an all-around great time!

Best of luck!

STEP 10: MAINTAINING THE MOMENTUM

Congratulations, you've done it! Now, there are two specific things that you can do to maintain the momentum:

- a) tell people about your success, and
- b) help us make Carrotmob even better by giving feedback!

Go ahead and use the media outlets we talked about in Step 8 and post pictures, video, and descriptions about the turnout, the business's increased profits, and the changes they made as promised. People who attended the event will be especially excited to see photo or video evidence of the promised changes.

And please help us make Carrotmobs even easier to plan and more effective. Take just a few minutes to [answer some questions](#) about your Carrotmob organizing experience ([Appendix 12](#)) to help us provide you and other Carrotmobbers with even better tools and resources.

THANK YOU

Thanks for being one of the early pioneers of this movement. We hope you continue to be involved as this adventure in activism and business evolves! And if you like what we're up to with Carrotmob be sure to check out the other campaigns we're working on at [Virgance](#).

"Revolution is not a word but an application; it is not war but peace; it does not weaken, but strengthens. Revolution does not cause separation; it generates *togetherness*."

-John Africa

CARROTMOB APPENDICES

Check out the appendices we've compiled to help with the planning and execution of your Carrotmob! Send us your feedback on how we can make these resources better and what else would be useful at info@carrotmob.org.

(APPENDIX 1) SAMPLE TIMELINE

(APPENDIX 2) DIVIDING THE RESPONSIBILITIES AS A TEAM

(APPENDIX 3) THE ART OF DESIGNING A CARROTMOB

(APPENDIX 4; AN EMAIL FORM) THE CARROTMOB ORGANIZER PROFILE

(APPENDIX 5) PRESS RELEASE TEMPLATES

(APPENDIX 6) RADIO ANNOUNCEMENT TEMPLATE

(APPENDIX 7) TARGETED BUSINESSES SPREADSHEET

(APPENDIX 8) INVITATION LETTER TEMPLATE AND BASIC PITCH

(APPENDIX 9) BIDDING STRUCTURE AND SELECTING A WINNER

(APPENDIX 10) CHECKLIST FOR WORKING WITH THE BUSINESS

(APPENDIX 11) SAMPLE SCHEDULE FOR THE BIG DAY

(APPENDIX 12; AN EMAIL FORM) WRAP-UP SURVEY TO IMPROVE CARROTMOB

This document has been written and compiled by Curtis Lefrandt, Erica Etelson, Susanna Schick & Brent Schulkin