



Democratic National Committee

PLAYBOOK

**A GUIDE FOR COORDINATED
CAMPAIGNS & STATE PARTIES**



Get Off of Instagram: The Playbook for Driving Offline Political Action with Chatbots

BEST PRACTICES FOR POLITICS & ADVOCACY

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ZOHRAN
FOR NEW YORK CITY

MOVEON

**STOP
AAPI
HATE**

F fwd.us

Julia Salazar
FOR STATE SENATE

More info at zutrau.nyc

Also, throughout this playbook, we'll use examples from my dog's chatbot account, as well as her Instagram page @ednatherunt



Using This Playbook

The following slides outline recommendations for social media chatbot usage in politics and advocacy contexts. While this broad strategic advice can be applied using many different chatbots, all examples are based on the use of Manychat. All appendices (slides 14-26) outline specific uses, limitations, and technical instructions for using Manychat.

If you'd like to try a social chatbot, you can try a free month of Manychat Pro by scanning this QR code, and entering discount code 'EDNA' when you sign up.

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With any questions or comments about the content in this playbook, please feel free to email hi@zutrau.nyc

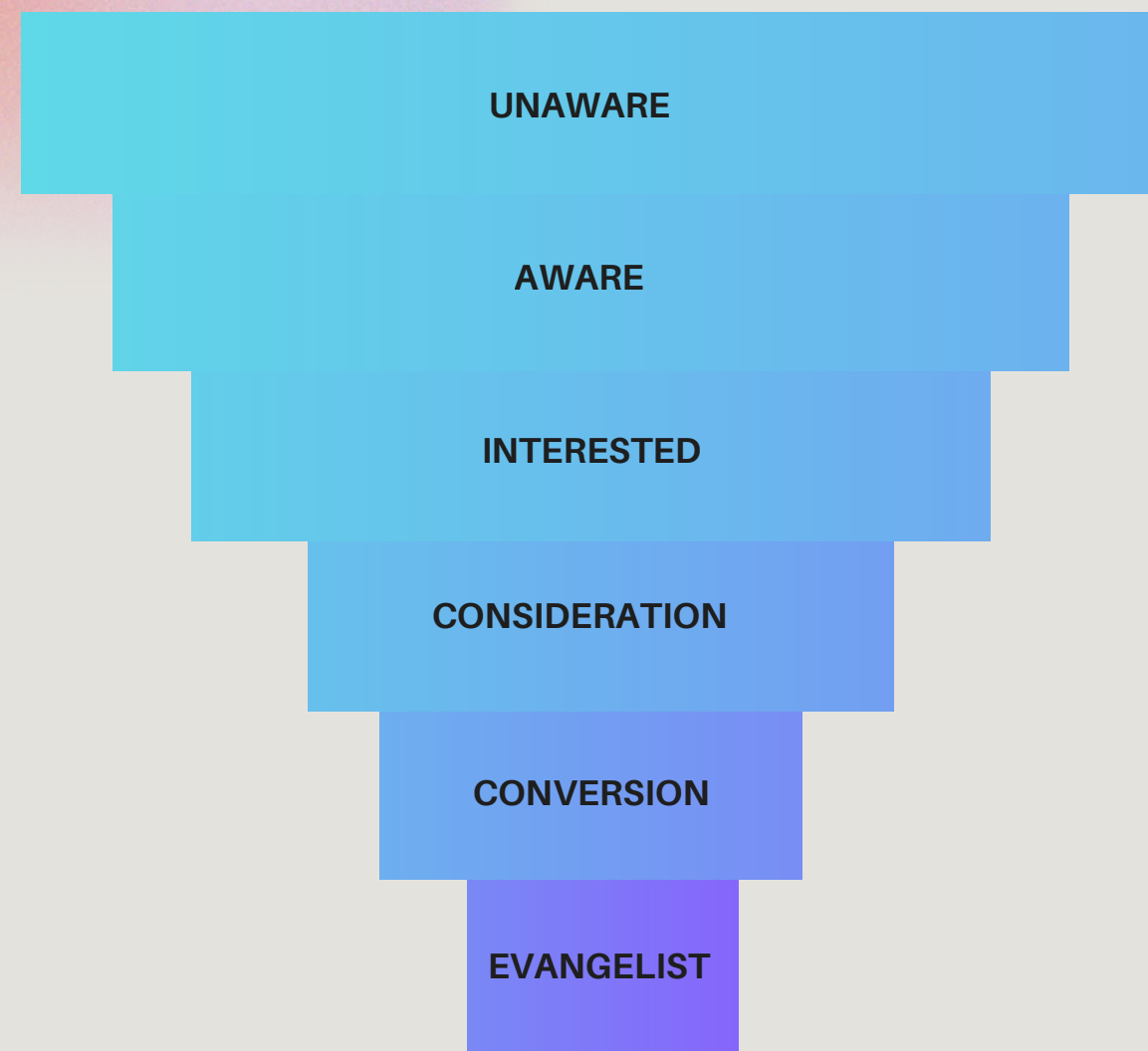
The Problem

When it comes to organic social media, getting people off of Instagram and turning them into petition signers, volunteers, donors, and voters has always been a particular challenge, because the app doesn't have clickable links in captions.

In marketing terms, it's always been tough to convert people from Instagram.

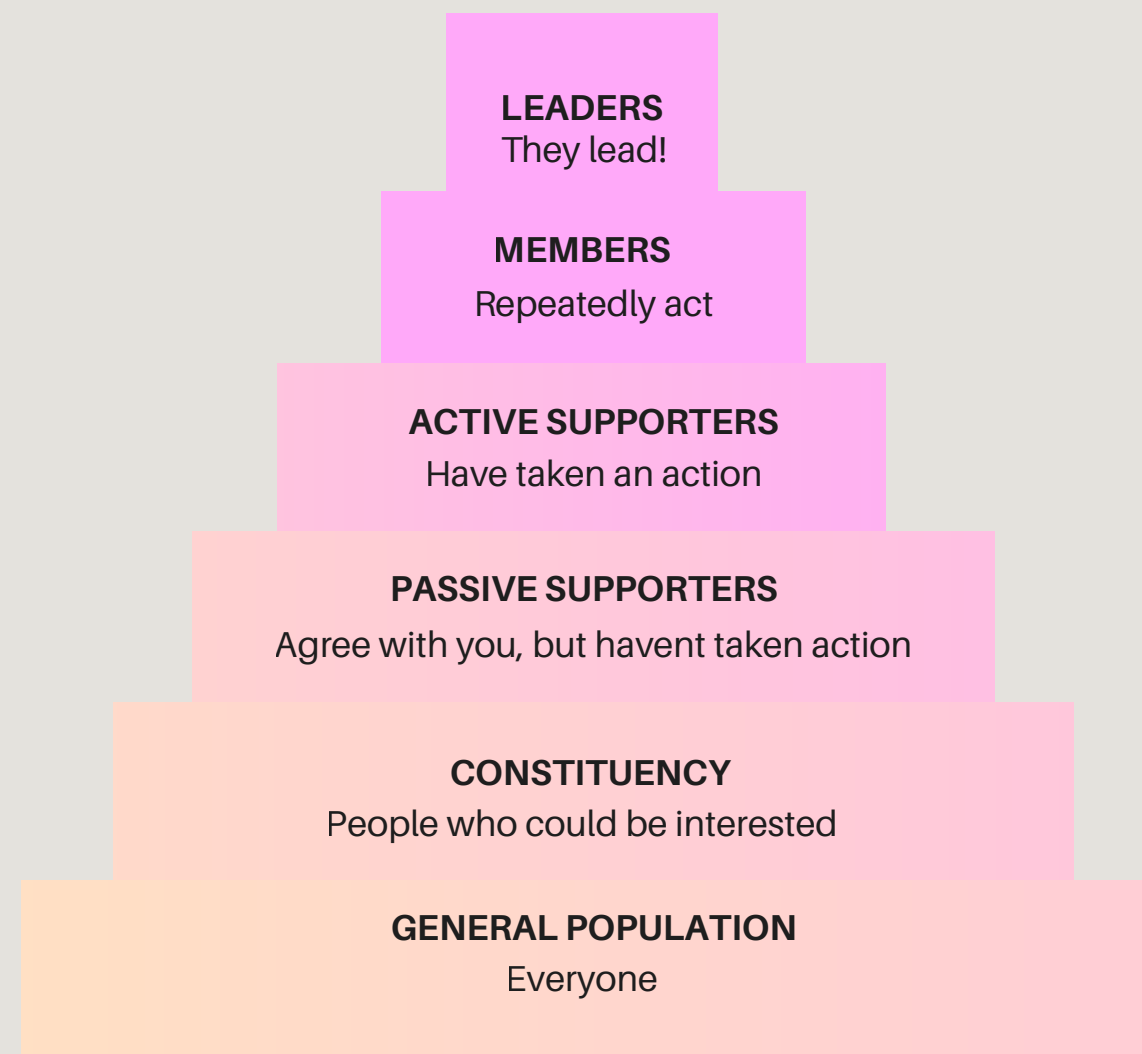
In organizing, it's important that we collect people's emails so that we can re-contact them again and again to make escalating asks, and develop their leadership by bringing them up our ladder of engagement

MARKETING



FUNNEL

ORGANIZING



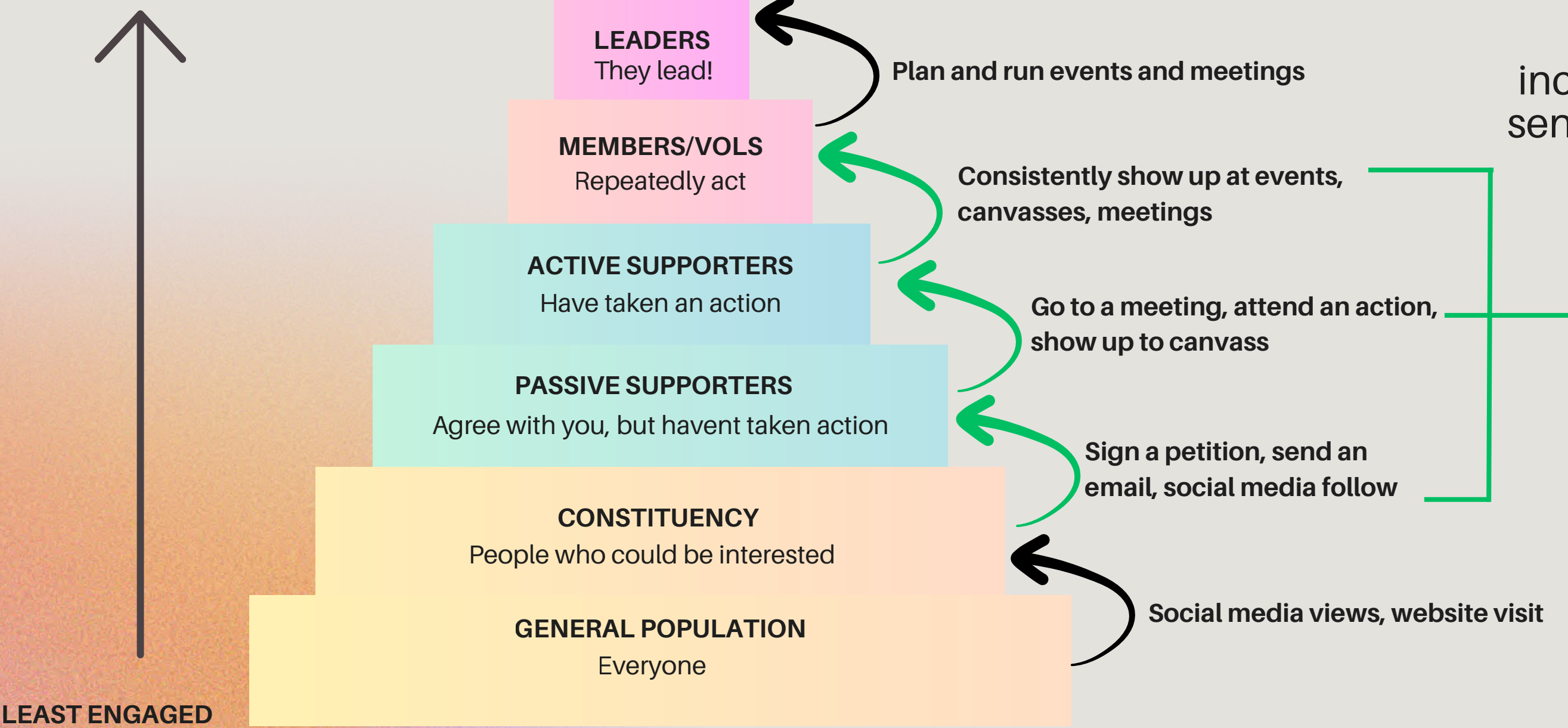
LADDER OF ENGAGEMENT

Organizing Ladder of Engagement

FROM INSTAGRAM TO ACTION AND DEEPER COMMITMENT

Collecting people’s contact information from Instagram has always been tough, because getting people off-platform has meant asking them to go find your link in bio, which often feels high-friction to users, resulting in significant drop-off, and low click-through rates.

MOST ENGAGED



Often, staff are given the task of community management, which includes responding to messages, and sending call to action links in DMs. This can be very labor intensive.

But with social media chatbots, we can bring people up our ladder of engagement in a way that is lower-friction, and reduces drudge work with automation.

Using bots, we can make low-lift asks, then eventually higher lift asks, and encourage people to take action again and again at increasing levels of buy-in.

LEAST ENGAGED

Social Media Chat Bots

“Comment [keyword] and we’ll DM you the link”

Customers.ai



Manychat

OAIK

chatfuel



There are many different chatbots that can respond to keywords with direct messages. A few examples are listed here.

This Playbook focuses on Manychat, but they all have their benefits and trade offs. Some are cheaper, some have generative AI features, some offer tagging and segmentation, and so on.

If you’d like to give a chatbot a try, see slide 3 for information on trying a free month of Manychat Pro.

Manychat as an Organizing Tool

**ZOHRAN FOR NYC CASE STUDY
APRIL-JUNE 2025**

In 2 months:

- **Sent over 77,000 automated direct messages on Instagram**
- **Generated over 21,000 clicks from DMs**
- **3,500+ emails collected directly in DMs**
- **Cost: \$318**
- **CPA: \$0.03**

Bot Flows

The 4 core flows that should be implemented on Instagram accounts focused on politics and advocacy. The goal is to increase points of contact, click-throughs, and conversions, while limiting spamminess by not sending unwanted or repetitive messages,

1. Comment-to-DM

Automatically send links:

“Comment [keyword] and we’ll send you the link”

2. Default Reply

Reply to every direct message:

“Thanks for your message! We read as many DMs as we can...”

3. Story Mention Reply

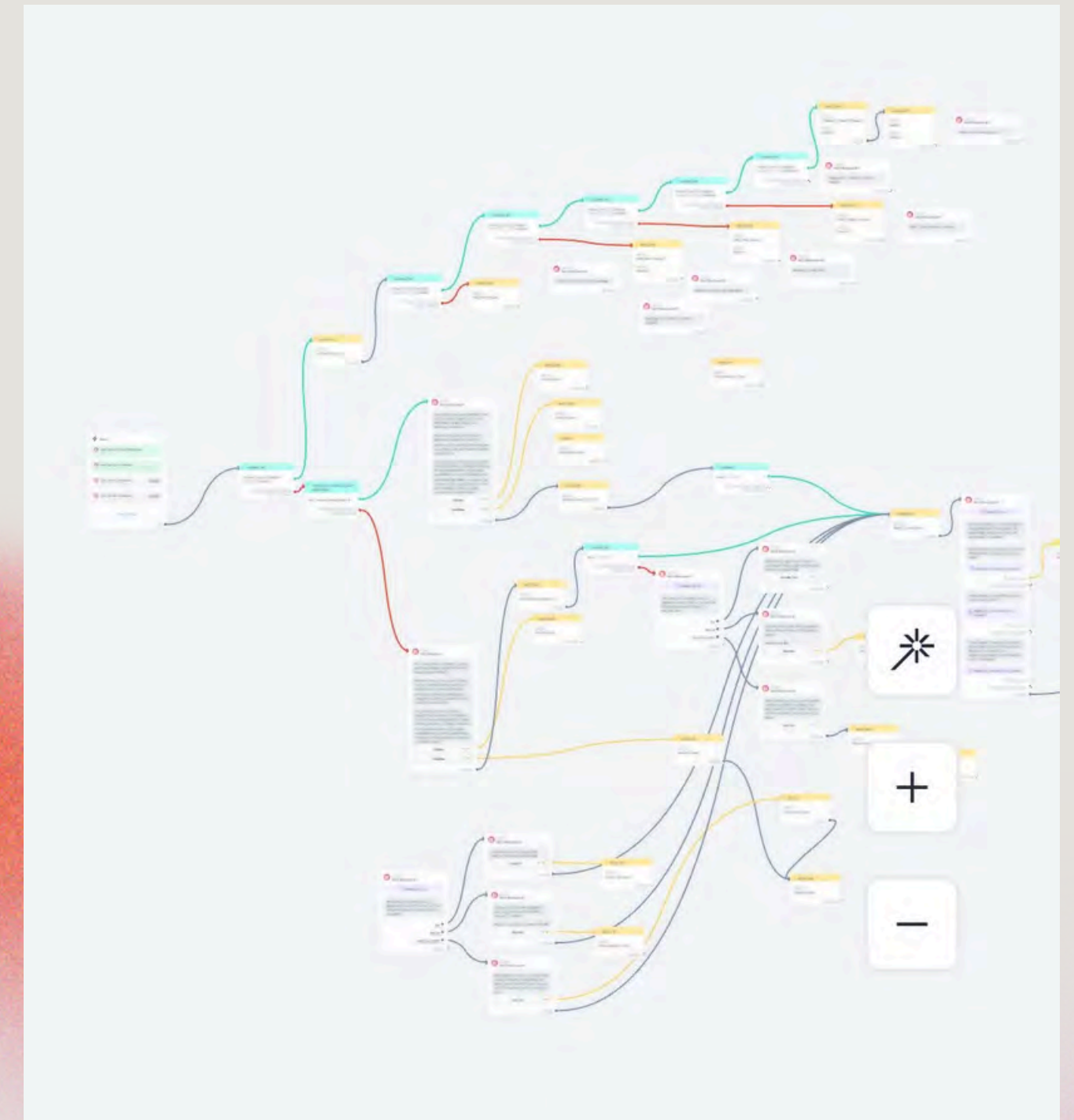
Reply every time someone tags you in a story:

“Thanks for the mention! We wanted to follow up...”

4. Secondary Email Collection Flow

Automatically collect emails without asking people to leave IG:

“Just type in your email below?”



An example of what a complex flow build can look like. But don't worry, we'll start much smaller.

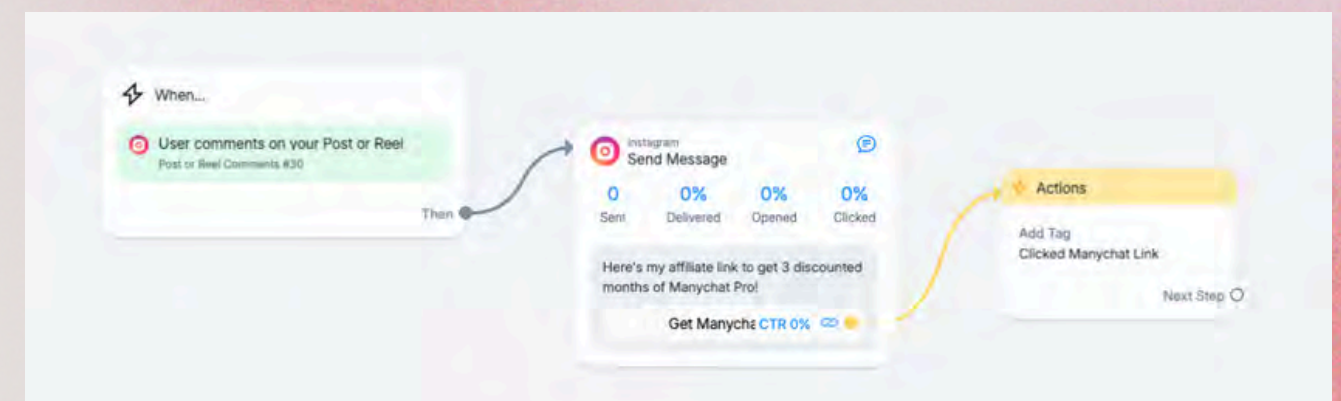
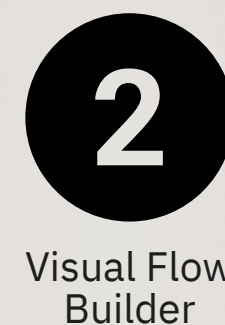
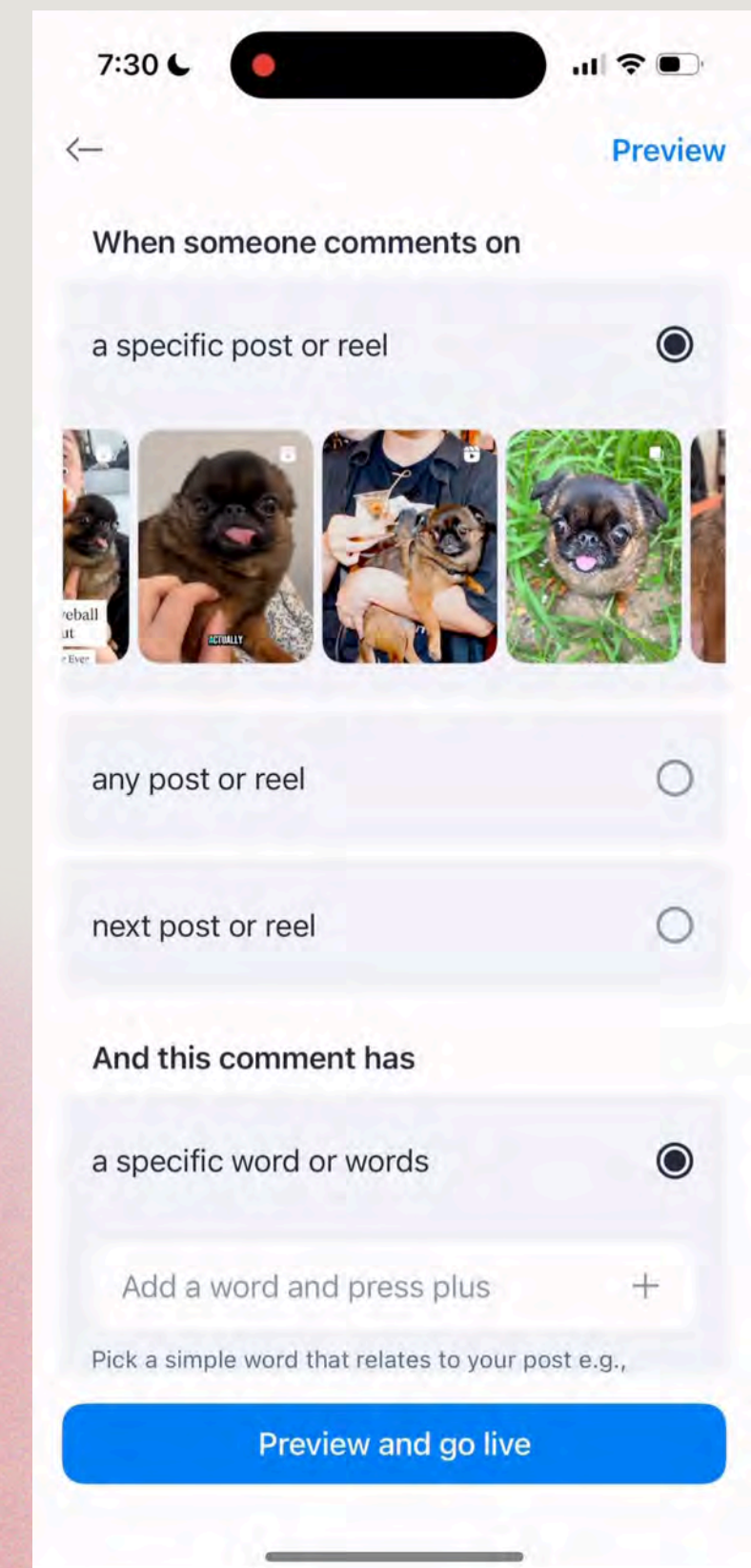
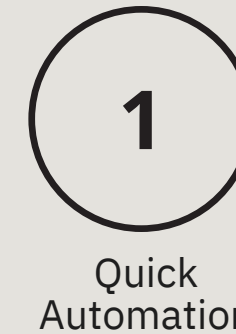
Comment-to-DM Flows

Automatically send links:
“Comment [keyword] and we’ll send you the link”

- Most common Manychat flow
- Better than “link in bio”
 - More algorithm friendly
 - User can revisit CTA later
- Average click through rate: 65%
- Up to a 98% click through rate

Can be built as “Quick Automation,”
but building from scratch in the visual flow
builder can provide more data

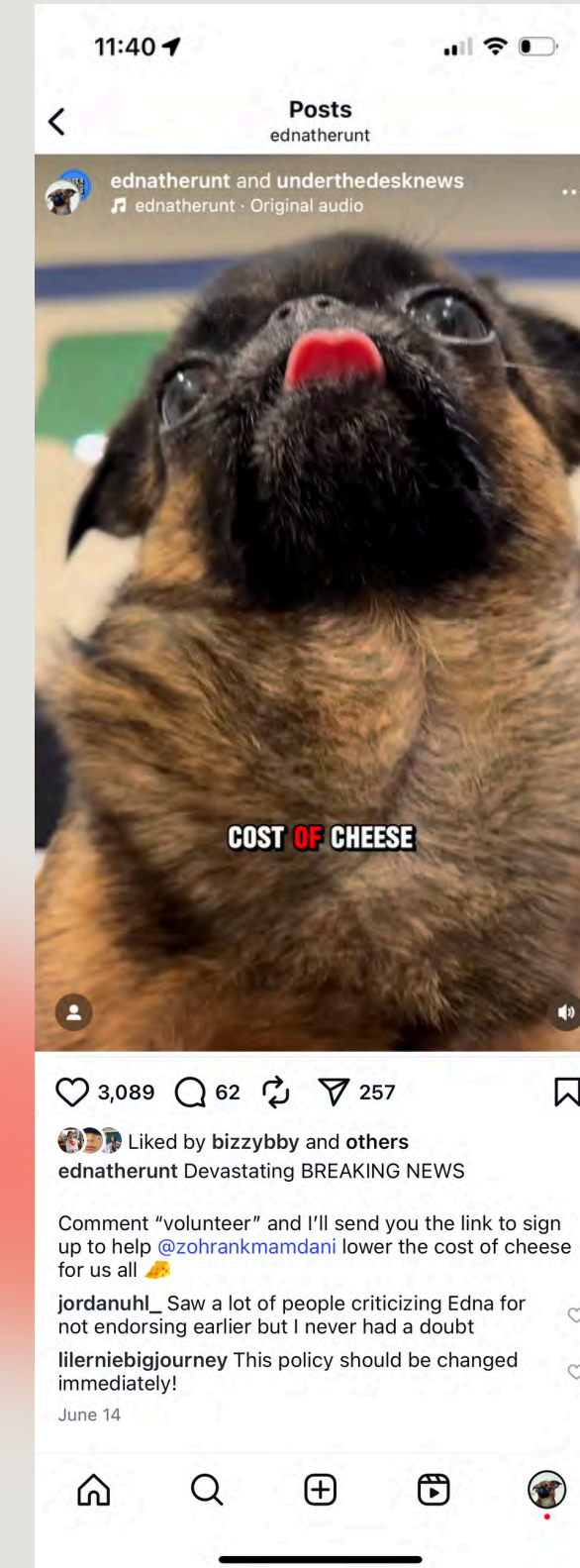
See appendices 1, 2, and 3 for more information on how to build these flows, and when and where to add tags.



Triggers for Comment-to-DM flows

What makes a good trigger?

- Simple and short, to decrease chance of typos. Generally keep triggers to 2 words.
- Combine words to avoid accidental triggers
 - Especially for “always-on” triggers
 - Examples: CanvassNow, NoWar, ReadMore, VoteToday, SignLetter
- For one-word triggers, only apply them to one post. One-word triggers that are always on can easily be accidentally triggered, leading to spammy messages.
- Give additional context when you can: “Comment “DonateNow” (one word, no spaces), and we’ll message you the link.”
- Not case sensitive, but capitalize words for legibility when combining words.



Comment “volunteer” and I’ll send you the link to sign up to help [@zohrankmamdani](#) lower the cost of cheese for us all 🧀

Bot Flows

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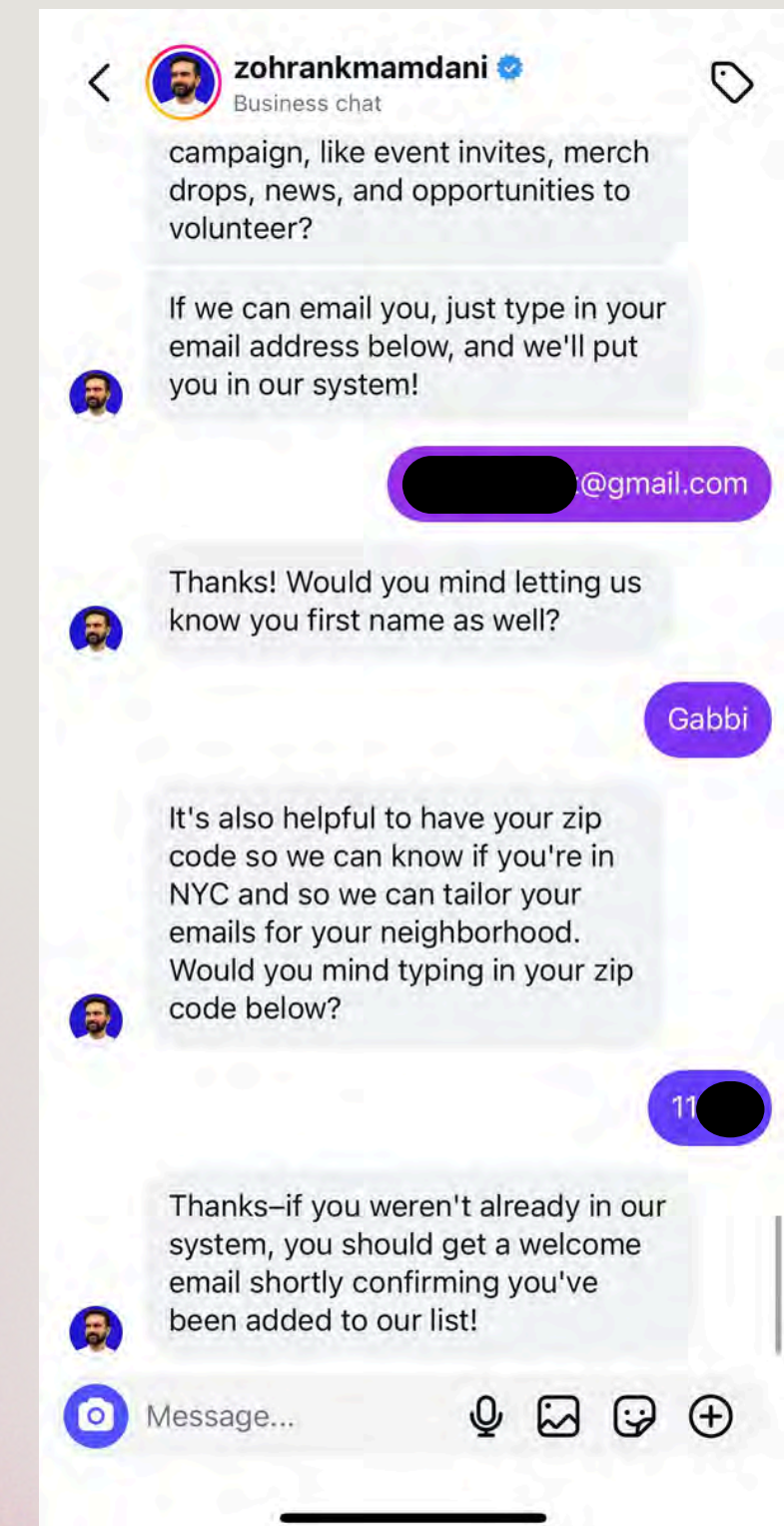
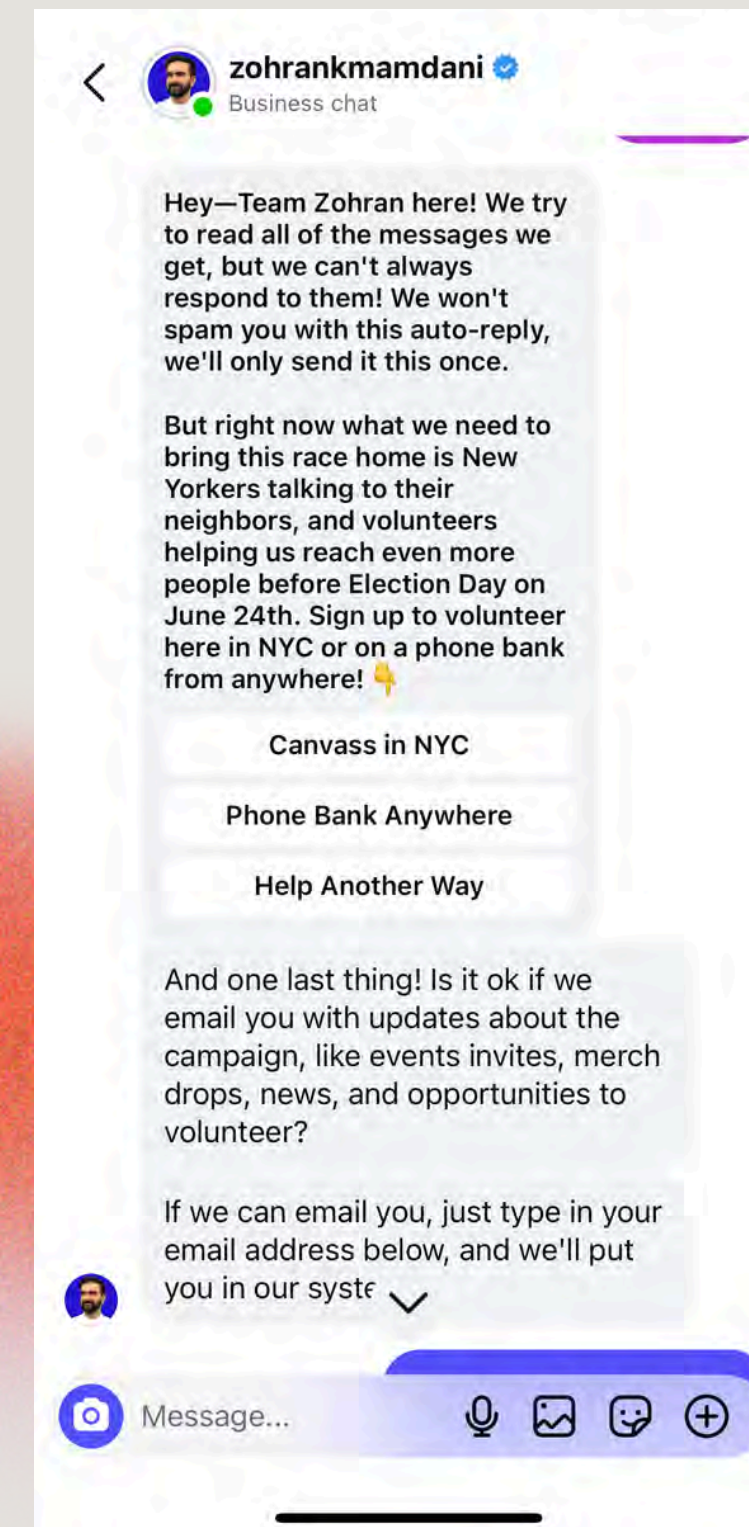
“Thanks for the mention! We wanted to follow up...”

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Automatically collect emails without asking people to leave IG:

“Just type in your email below?”

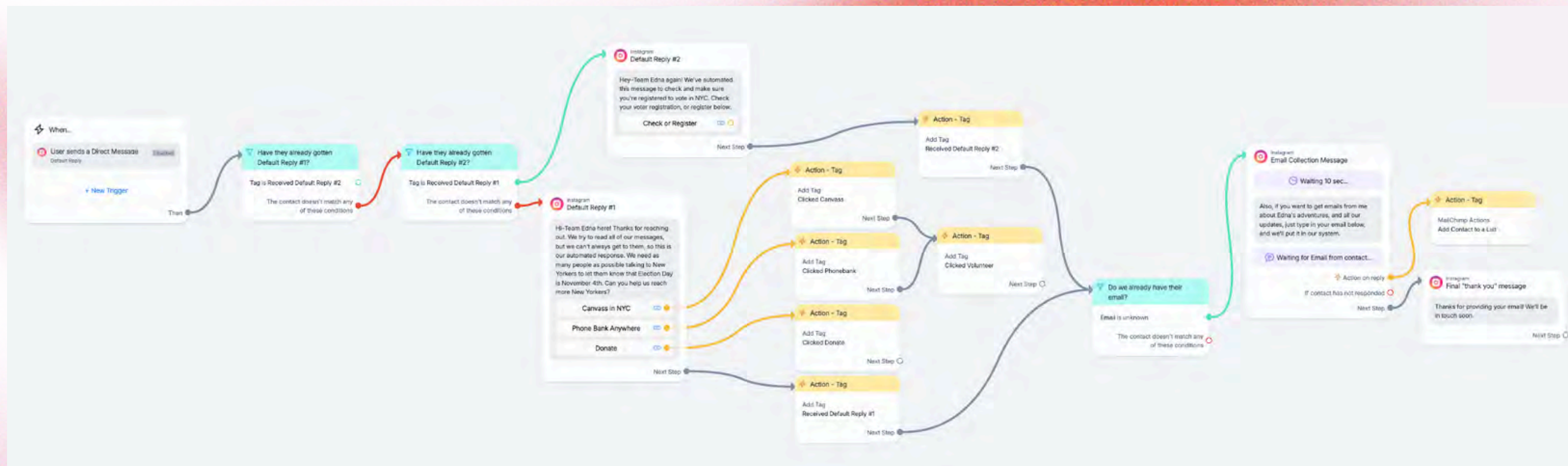
Up next: building these complex flows



Best Practices for Complex Flows

- Don't try to hide that it's an automation
- Don't spam people with unneeded, unwanted, or repetitive messages
- Collect data through tagging (a lot)
- Tailor messages for different segments, and customize experience using conditions
- Always test flows before they go public

For all context and technical information on how to build this flow, see appendices 7, and 8A-8D



Test your flows:

1. Use a different account to trigger the flow. This is the most surefire way to ensure your flow works.
2. Test with the preview feature inside of Manychat before turning it on

Common Pitfalls

- 1.** Meta limits what can be sent to users. Unless a user messages you first, or until a user messages you back, your account can only send one message to a user *per flow*. This often causes confusion when setting up and saving certain flows. See appendix 4 for more information about this common issue.
- 2.** Do not turn on automatic likes. Many bots offer a feature that automatically likes all comments or messages. As political accounts often receive inflammatory or negative messages, it is best to leave this feature *off*.
- 3.** When using an email collection flow, make sure a welcome email is turned on in your CRM. When users hand their contact information over to a bot, it's ideal to connect the dots from Instagram over to their inbox, so they know what's been done with their data. Sending an immediate welcome email can help built trust.
- 4.** Test after every edit. Even the smallest tweak can change whether or not your flow works. Ensure functionality by previewing your flow before it goes live, **and** by testing it from a second Instagram account before the flow is publicized.



Getting Started

How to get your team to say yes to implementing a chatbot

1. Generally encourage and emphasize a culture of experimentation
2. Prepare to go viral. Set up your automations so you're ready for a high volume of interactions and you don't miss out.
3. Emphasize that if used correctly, chatbots take work off of your plate
4. Highlight that the more you use it, the lower your CPA. It can easily pay for itself.
5. Your first month is free if you use code EDNA at my affiliate link:
<https://manychat.partnerlinks.io/Zutrau> or just scan here —————→



QUESTIONS?

email hi@zutrau.nyc or



Sign up to get email updates from me.

Appendix 1

Comment-to-DM Flow

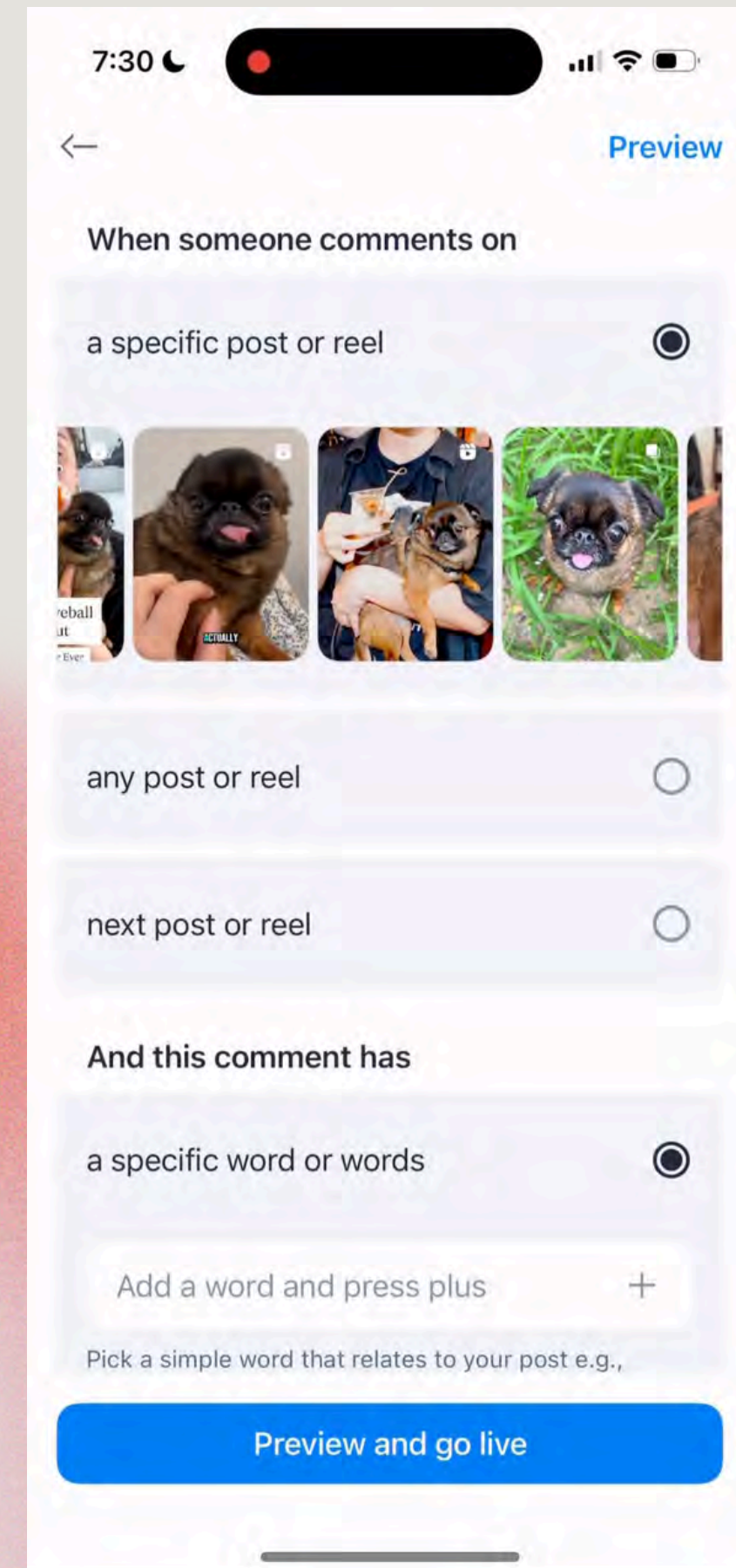
Setting up a Comment-to-DM flow as a quick automation

The fastest way to set up a comment-to-DM flow is to set up a “quick automation.”

Simply pick which posts you want the flow to apply to: a specific post that’s already live, the next upcoming post that has yet to go live, or all of your posts.

Then fill out each field with the keywords you’d like to use as a trigger and with the content you’d like to send as a response.

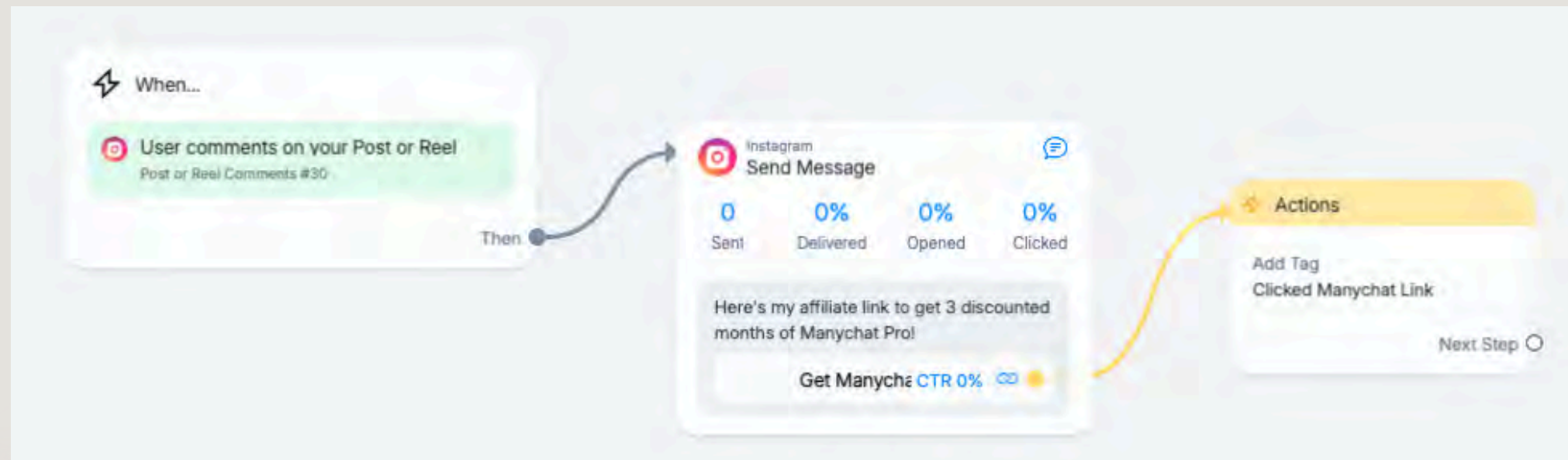
Next we’ll build a comment-to-DM flow in the visual flow builder, but first, we’ll go over some terms...



Appendix 2

Comment-to-DM Flow

Setting up a comment-to-DM flow in the visual flow builder



Use the visual flowbuilder to ensure that your contacts receive tags so that you can send them more tailored messages later on, based on their actions or on messages you've sent them.

To build a flow in the visual flow builder, go to the Automations tab in Manychat, hit the "New Automation" button in the upper right hand corner, then hit the "Start from Scratch" button, and choose "Start with Blank" from the drop down.

Once you've entered the visual flow builder, pick the trigger "user comments on a post or reel" and add the keywords that will trigger your flow. Then add your content to the second node, including any links.

To add a tag, choose "+ Actions" from the drop down menu. Then hit the "+ Action" button in the action note, and choose "Add Tag" as your action. Then pick the tag you'd like to add from your list of tags, or create a new tag by typing in the name of the tag, and hitting the + sign below.

To add a conditional as a step, simply hit the "+ Condition" and pick the conditions you'd like the bot to look for, like "contact has tag 'clicked volunteer'" or "user has over 20,000 followers" or "user follows your Instagram account."

Appendix 3

Building & Using Tags

Things to note before you start building complex flows

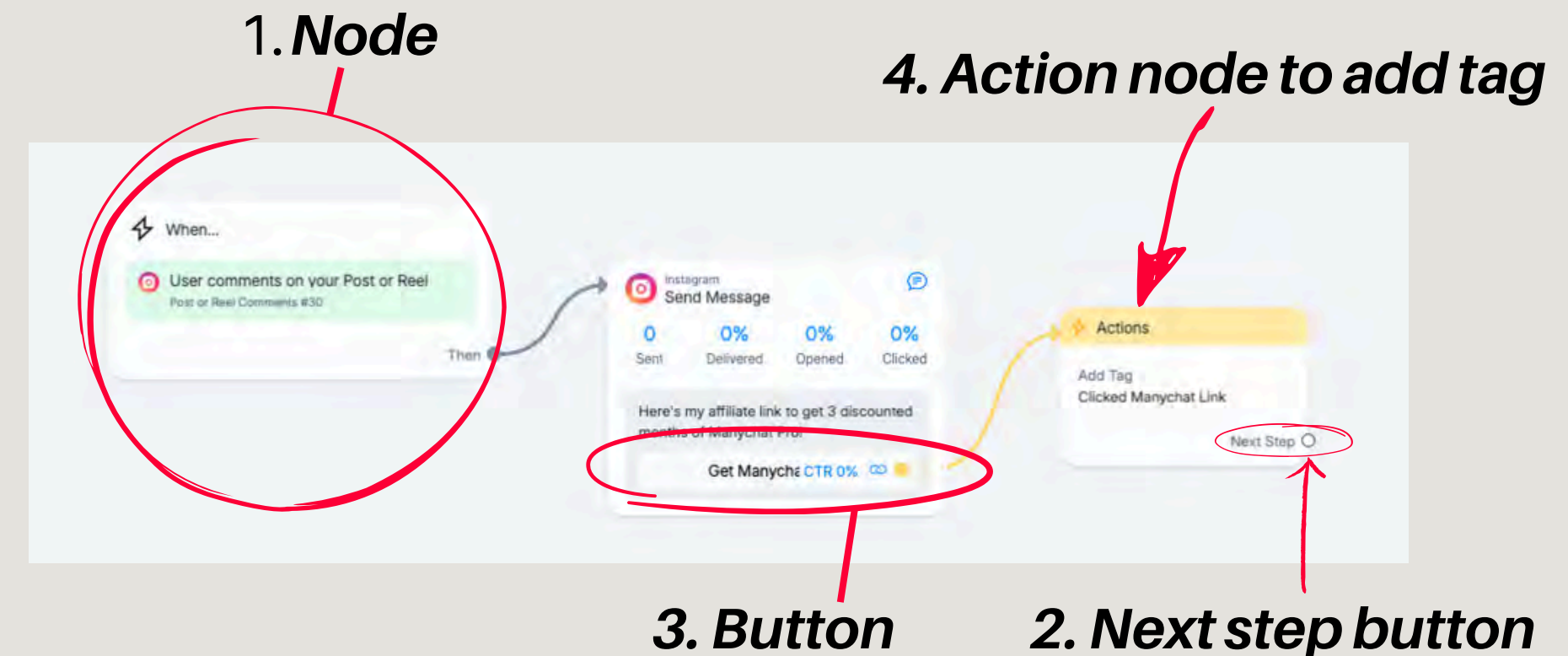
1. Each step of your flow will be contained in a rectangular block, called a **node**.
2. You can add steps in a flow by clicking the **next step button**, and holding the click into the empty space next to your last node. The lines that connect your steps can be deleted by hovering over them, and hitting the trashcan logo.
3. You can add up to 3 **buttons** to your nodes, linking out to websites. You can also add “quick replies” to your node, which look similar to buttons, but when the user clicks a “quick reply,” it will appear and send as a reply from their account. Such a reply can trigger the next step of your flow.
4. As a step in your flow, you can add **tags** and conditions, to tag users as having recieved certain messages, and then to only send them specific messages under certain conditions.

Examples of tags you can add to contacts who engage with your bot: “*clicked volunteer*,” “*NYC-based*,” “*Influencer*,” “*Recieved Default Reply #1*.”

Example condition steps you can add to your flow:

“*If contact has recieved default reply #1, send them default reply #2*”

“*If contact has over 20,000 followers, send them message 1. Otherwise, send them message 2.*”



Meta Limitations

Why you may see an error message when building a flow

- Meta has parameters in place that protect its users from spam. One of these parameters will prevent your account from sending users multiple messages until they send you one back.
- If a user messages you first, this issue won't arise, since the user has indicated they want to have a direct messaging relationship with you.
- To get around this, and to be able to send multiple messages with one flow, one after another, you can set up an "opening message" that includes a "quick reply" button. This is a pre-written reply, which the user can simply tap in order to send the reply. This quick reply will constitute proof to Meta's system that you are not spamming their inbox.
- If you try to set up a multi-message flow with no "opening message," you will get these confusing error messages. →

If the goal of your call to action is simply to achieve as many click-throughs as possible, skip the "opening message," as including one will increase friction for the user by adding steps to the process of getting to their destination, and you will see lower click-throughs because of it.



⚠ Send **within 24 hour window** ?

Mark this message as a "Private Reply" if you want to send it as a reply to a post, reel comment, a follow action or share to story reply.



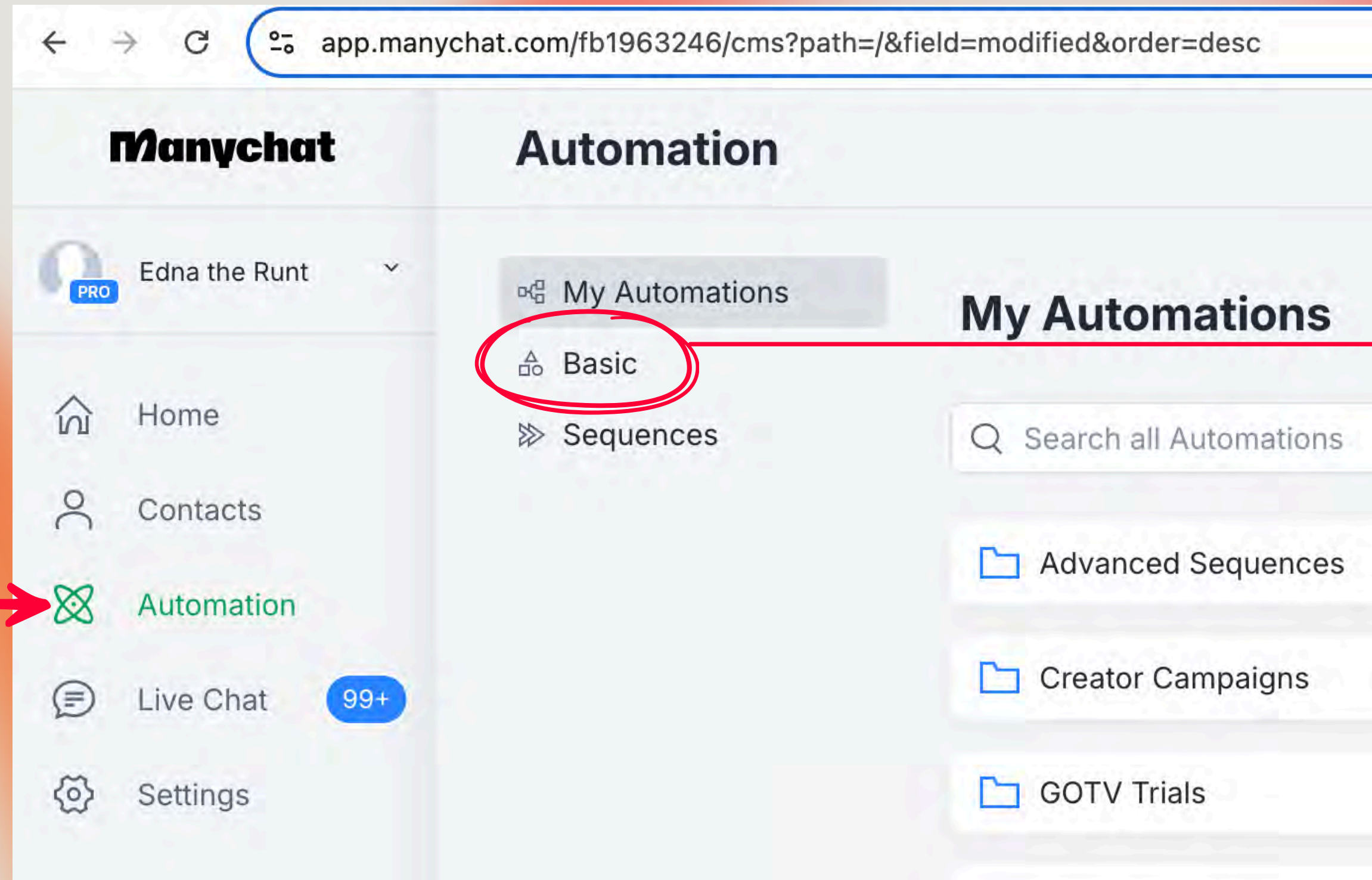
Appendix 5

Building Complex Flows

Build default reply and story mention reply flows so that everyone who messages you or tags you in a story is responded to with actionable ways to support you.

Go to your automations tab, and navigate to the Basic automations section.

Automations Tab

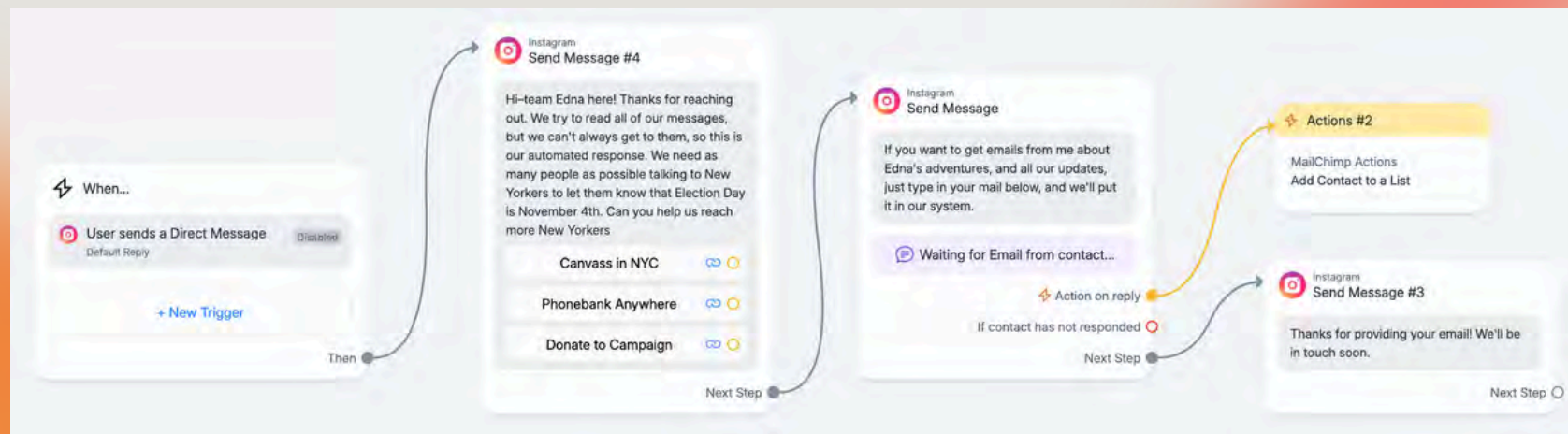


Your **basic** automations

Appendix 6

Building Complex Flows

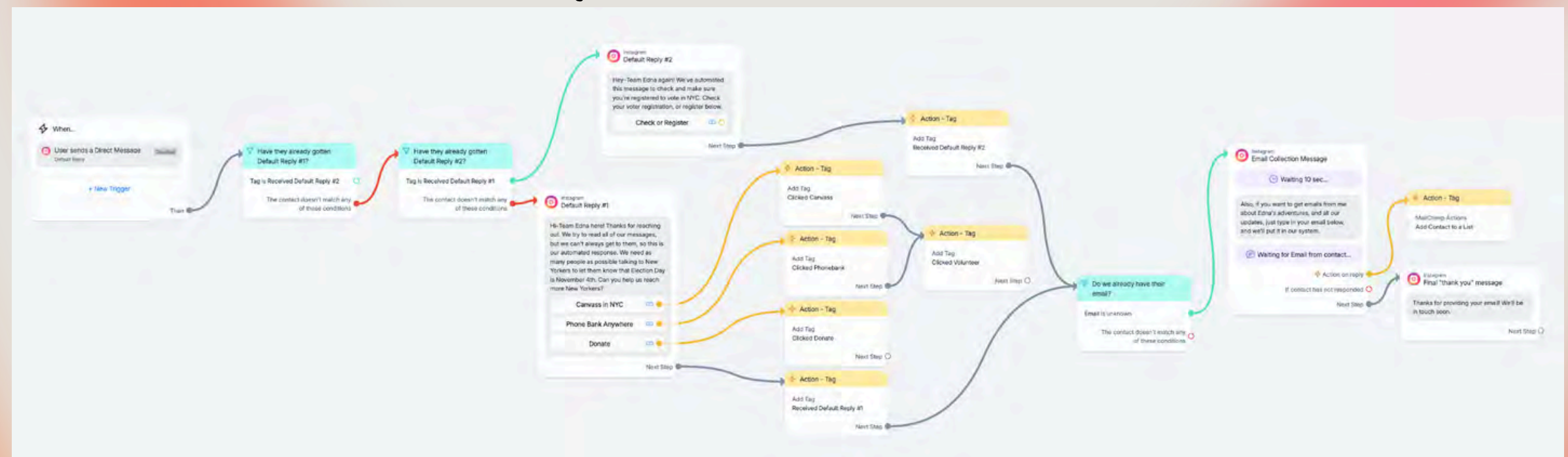
The basic outline



When responding to all messages, there are important steps you should take to build trust through this touchpoint with your audience, rather than sending messages that feel like spam to users.

Adding tags and conditions to your flow is key for ensuring you're not sending unnecessary or repetitive messages to people. Ensuring that users only receive valuable messages from you is important for making sure your most enthusiastic followers don't get turned off from messaging you.

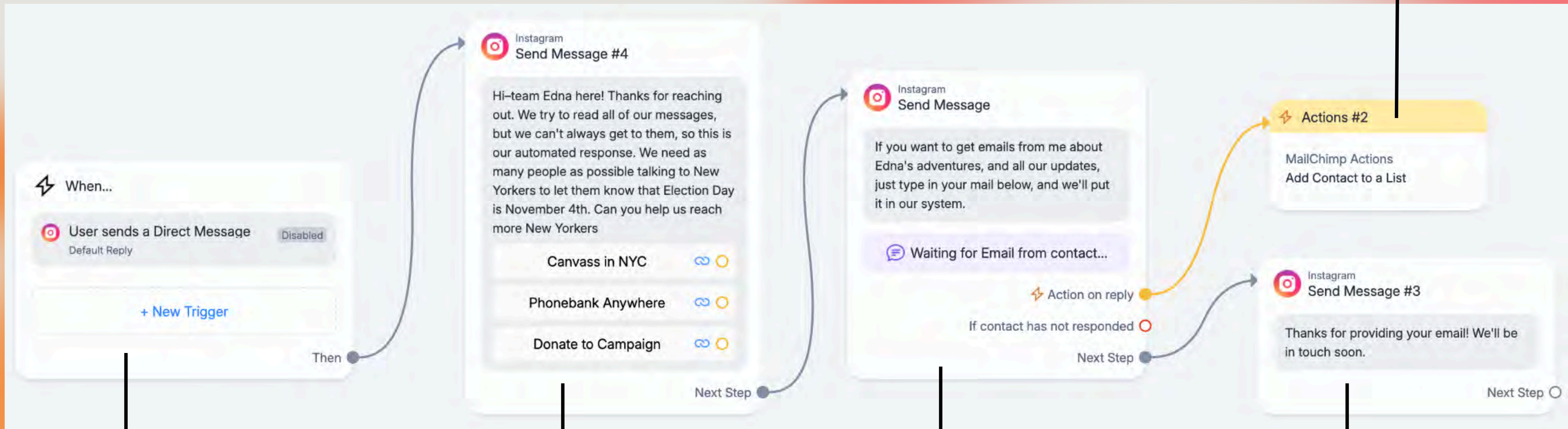
The final flow



Appendix 7

Basic Outline of a Default Reply + Email Collection Flow

Action node: collecting the email address they typed out, and transferring it directly to your CRM or Google sheet



Trigger:
user sends
message

First message:
acknowledge this is an
automated message and offer
a few ways to engage

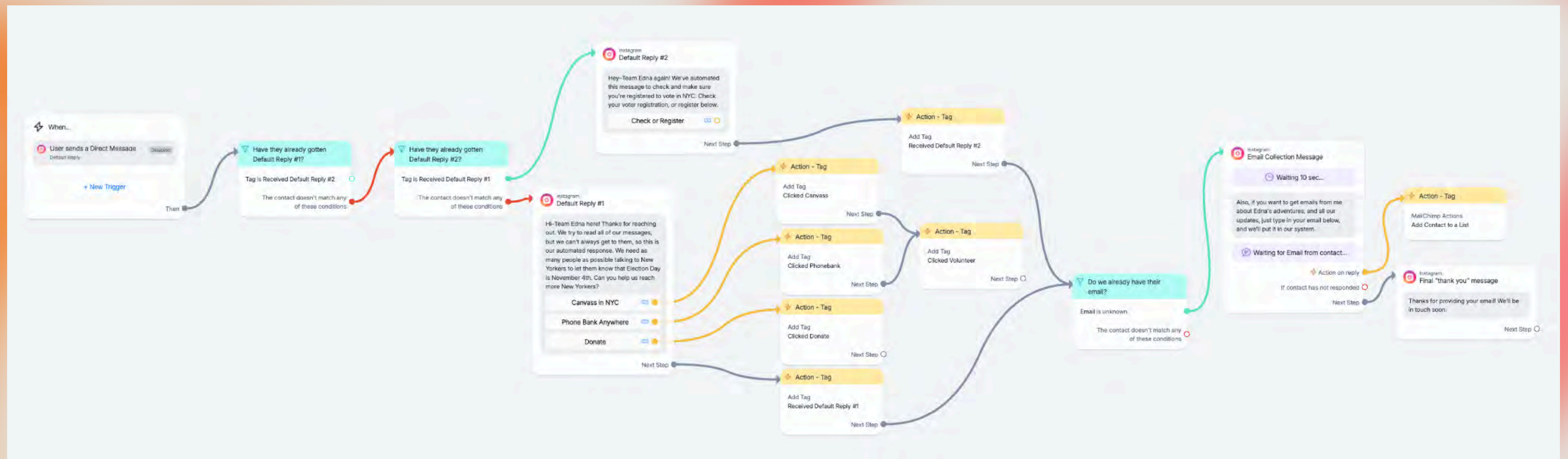
Second Message:
ask contact to type
their email address
out in the chat

Third message:
a thank you message
letting the user know
you've collected their
email

Appendix 8A

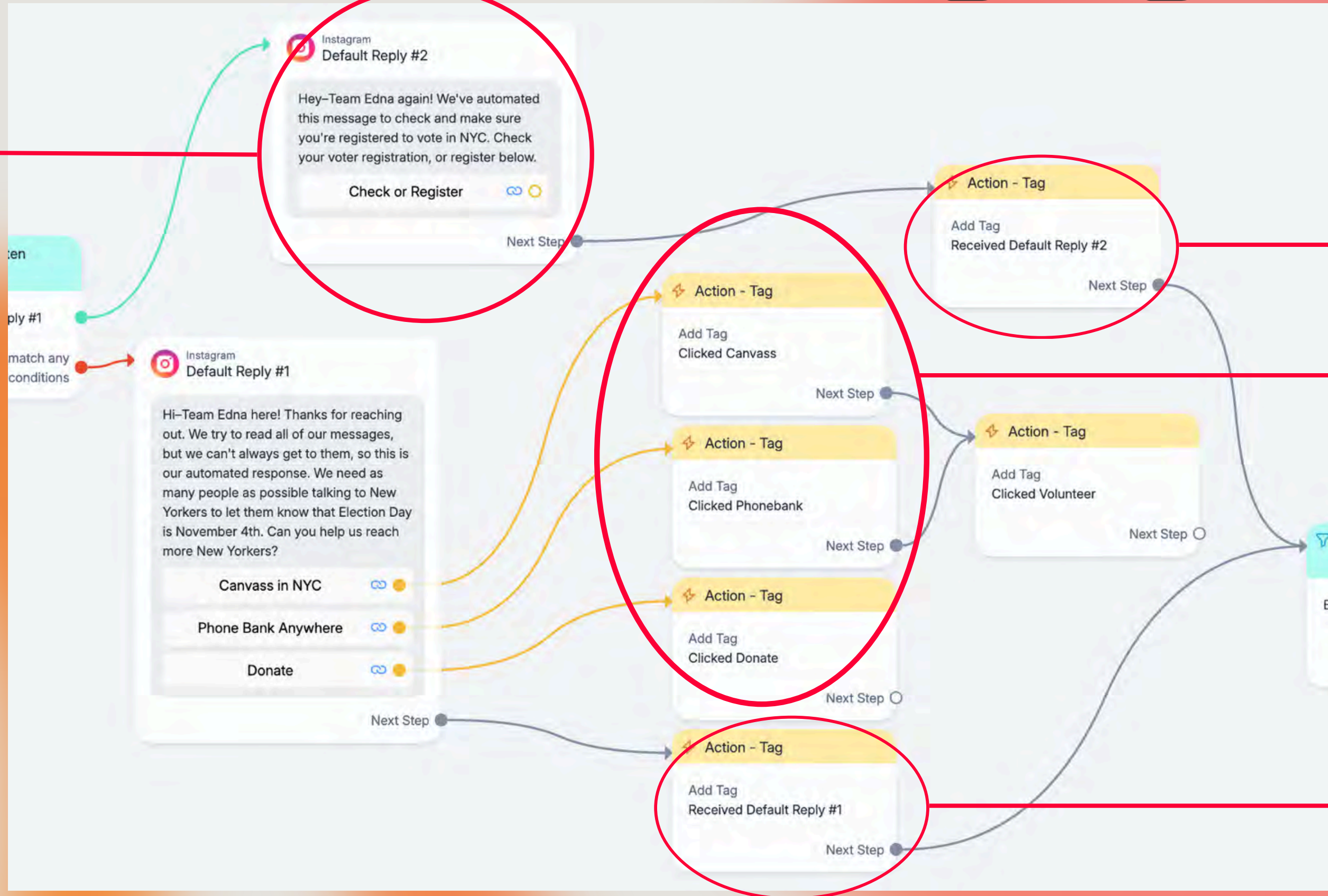
Building Complex Flows

There are several locations in the flow that additional nodes can be added to decrease spamminess, and increase efficacy. We'll look at the flow up-close in a few different chunks. We'll start with the middle chunk, since our initial conditions are based on which of these tags contacts have received.



The Middle Chunk: Adding Tags

A secondary Default Reply, so if users message you more than once, they'll get this other message and be offered more ways to engage.



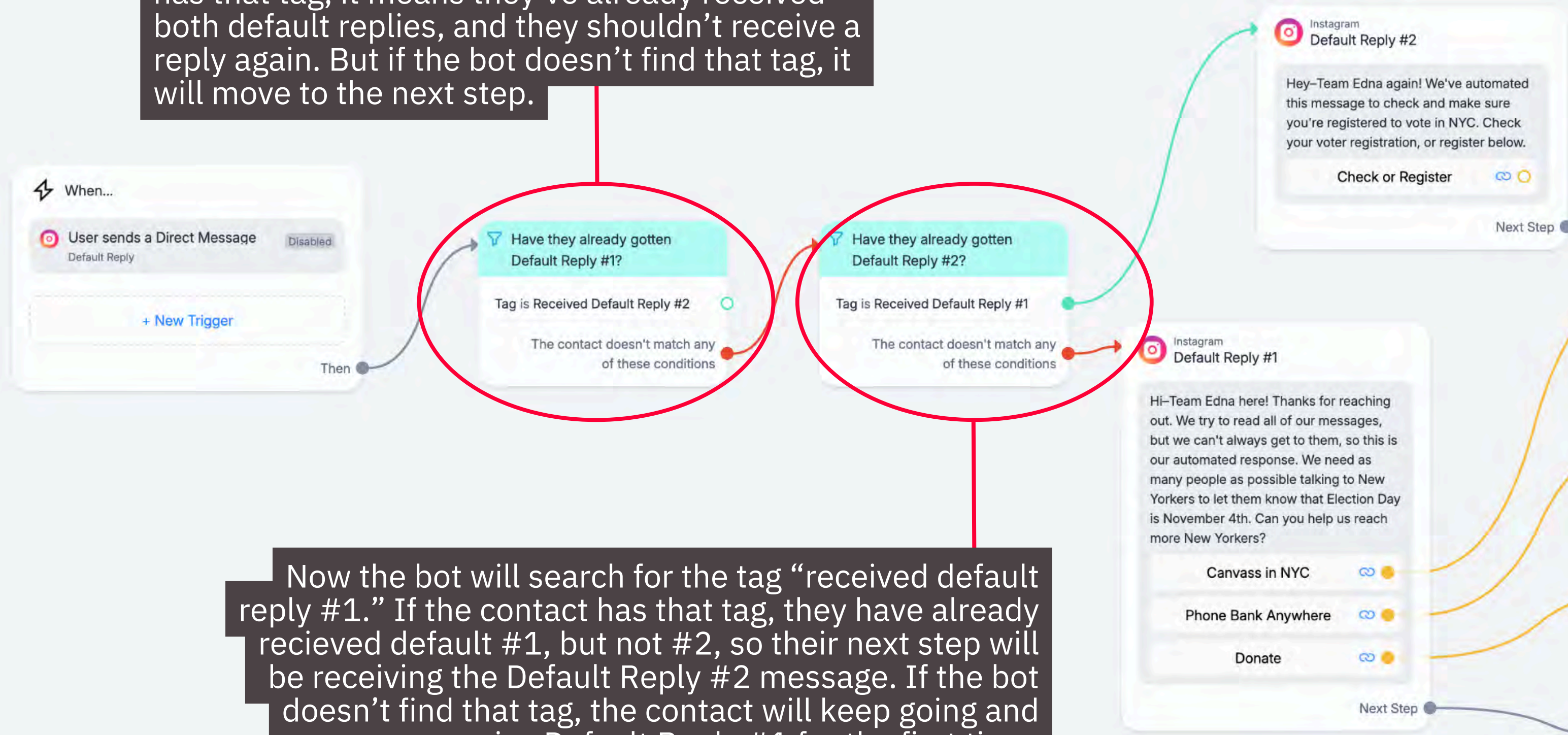
Tags the user as having received Default Reply #2

Tags the user if they click specific buttons

Tags the user as having received Default Reply #1

The Beginning: Sending the Right Message

After the user triggers the flow, the bot searches for the tag “received default #2.” If the contact has that tag, it means they’ve already received both default replies, and they shouldn’t receive a reply again. But if the bot doesn’t find that tag, it will move to the next step.

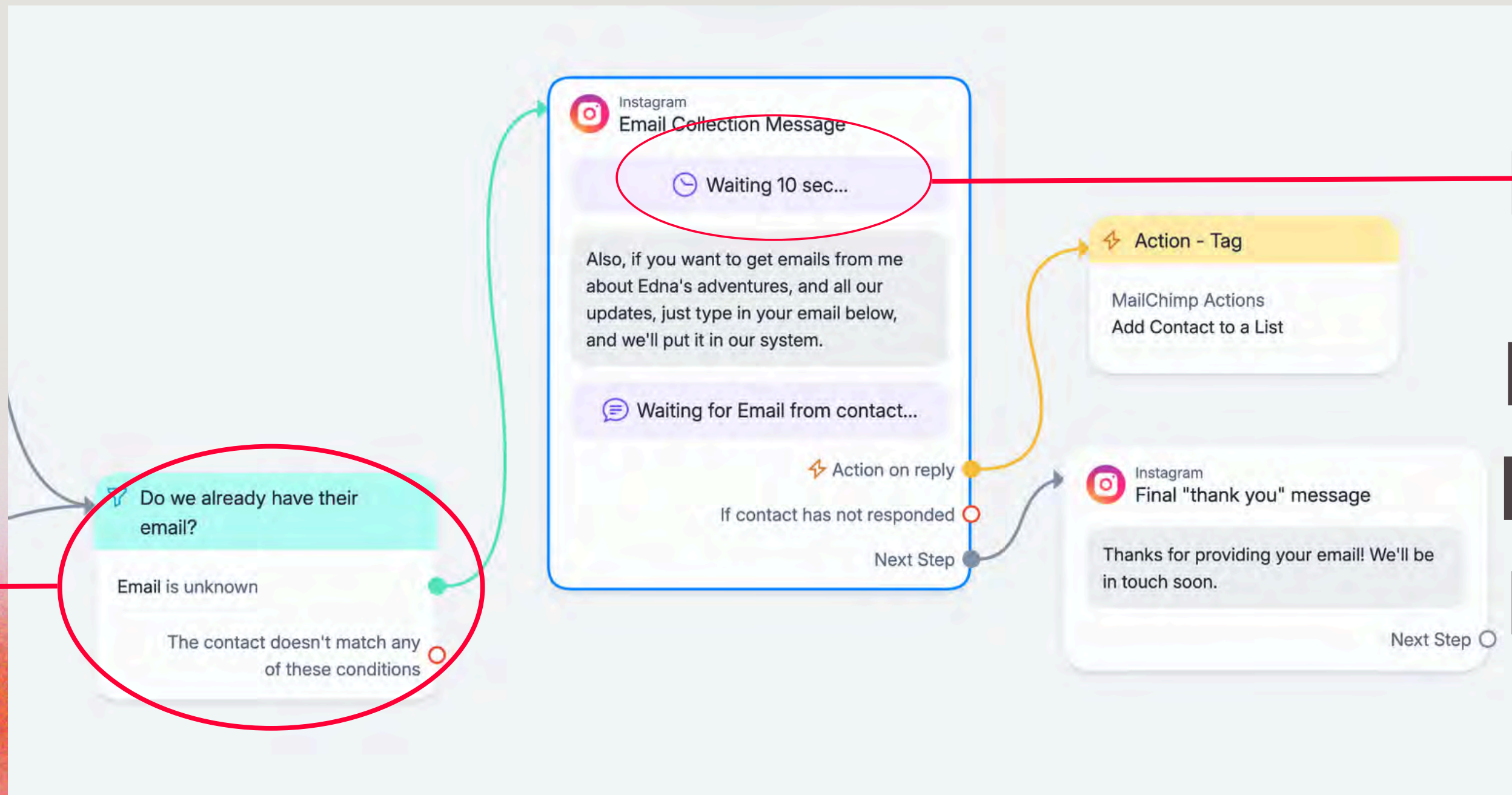


Now the bot will search for the tag “received default reply #1.” If the contact has that tag, they have already received default #1, but not #2, so their next step will be receiving the Default Reply #2 message. If the bot doesn’t find that tag, the contact will keep going and receive Default Reply #1 for the first time.

Appendix D

The End: Following Up with the Right People at the Right Time

This condition makes the bot ask whether we already have the contact's email address. If we do, we won't send them to the email collection flow, and the flow will end here.



Add a 10-20 second delay to this second message. Without a delay, this message would send immediately after the first one, without giving users an opportunity to read the first message. Adding a delay before the second message allows for users to click links and browse websites, or fill out forms before they're hit with a second ask.