

# Relationship Management for Political Communicators: Best Practices for Constituent Relationship Management (CRM)

Presented to

**The Politics Online Conference**  
The Graduate School of Political Management of  
The George Washington University  
March 21, 2003

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## What is CRM?

**CRM is the art of leveraging**

- **people,**
- **information/data,**
- **process, and**
- **technology**

**to optimize the way an  
organization markets to, engages,  
and services its constituents.**

## Why is CRM Important?

### ◆ Adds value for your constituents

- They can control their preferences (ranging from the format and frequency of email communications to the type of information they receive both on- and off-line) through self-managed user profiles.

### ◆ Adds value for your organization:

- Saves you time and resources
- User self-identification and metrics enable you to more effectively target the segment(s) of your constituency you most want/need to reach.

## Best Practices for CRM: Adding Value for Constituents

◆ The Annenberg Public Policy Center at the University of Pennsylvania conducted a series of focus group sessions that confirmed visitors to political web sites want control over their experiences online, including:

- Ability to Opt In/Out
- Clear Privacy Policies
- Choices on When and How to Receive information
- Ability to Interact with the Organization

## Adding Value for Constituents: Opt In (and Out) Registration

- ◆ It should be easy for users to opt-in, change their profiles and preferences, or opt out.

The screenshots show the following content:

- Top Left:** "Nuclear Threat Reduction Campaign" header with a "What You Can Do" link.
- Top Right:** "Calendar of Events - March 15, 2003" listing a "Share Idea, W. Mar 2003 12:15:48 -1794-0377" event.
- Middle Left:** A registration form with a "Submit" button and a "Welcome! Your committee today is essential. To take action, please type your e-mail address in the box provided below." field.
- Middle Right:** A "Calendar of Events" section listing events for March 15, 16, 17, and 18, 2003, including locations like "London, U.K." and "Washington, D.C.".
- Bottom Left:** A "Welcome! Party" section with a "Submit" button and a "Welcome! Party" heading.

Red arrows point from the text "Provide multiple opportunities and clear info on how the process works to increase constituent satisfaction" to the registration form and the event calendar sections.

Penny Crawley -- March 21, 2003 Page 5

## Adding Value for Constituents: Opt In (and Out) Registration

- ◆ Opt out is critical when buying names or doing paid outreach

Allow users to opt out early and through multiple venues

Subject: Thank you for sending a letter to Congress!  
 From: [info@justiceforall.org](mailto:info@justiceforall.org)  
 To: [Redacted]

Dear Penny Crawley,

Thank you for agreeing to send letters to Congress about the Guantanamo Detention Act. We appreciate your support.

If you find you're receiving this email in error or have changed your email address, please contact our Member of Congress directly or call 1-800-368-5888. We will have to delete your letter to Congress to protect your privacy and the privacy of our mailing lists. You may receive our primary mailing at [info@justiceforall.org](mailto:info@justiceforall.org).

Apologies for any inconvenience.  
 Thank you,  
 Campaign for Criminal Justice Reform



## Adding Value for Constituents: Clear Privacy Policies

**Privacy Policy for the Vietnam Veterans of America Foundation's (VVAF)**

At Vietnam Veterans of America Foundation (VVAF), we value your support and we are committed to protecting your privacy. Our site is a safe environment for anyone who needs or makes a donation. The purpose of this statement is to share with you our policy concerning your privacy.

- What we will
- What information we collect and how we use it
- How long your information is stored
- How we protect a privacy statement for online financial data
- How to you contact or change your information

**Who are we?**

Vietnam Veterans of America Foundation (VVAF), a non-profit, charitable, 501(c)(3) organization, is an international humanitarian, advocacy group dedicated to help certain victims of war.

## Adding Value for Constituents: Information Choices

**Please select the type of information you want to receive by checking the appropriate items below:**

- Press releases and other news updates
- Information about special events
- Information about VVAF's rehabilitation clinics
- Information about VVAF's Spinal Cord Injury program
- Information about Joint Hazardous Site Products
- Updates and reports from the Information Management and Mine Action Program (IMAP)
- The Memorabilia, VVAF's newsletter
- How I can support VVAF's work

## Adding Value for Constituents: Ability to Interact



Penny Crawley -- March 21, 2003

Page 9

## Adding Value for the Organization: User Control Saves Time and Resources

- ◆ No staff time is needed to add/remove names from mailing lists or update user preferences.
- ◆ Providing clear information on-line can help reduce email or telephone inquiries about functionality and processes (e.g. how do I volunteer/donate/ get involved?)
- ◆ Creating opportunities for interaction help you direct the information received to the right place right away.

Penny Crawley -- March 21, 2003

Page 10

## Adding Value for the Organization: Use Self-Identification To Target Key Audiences

- ◆ User self-identification of interests saves costly research into finding who is part of your most important audiences.

The image shows two screenshots of a web registration form for the 'Nuclear Threat Reduction Campaign'. The left screenshot displays the registration steps: 'What You Can Do', 'What You Can Do', 'What You Can Do', 'What You Can Do', 'What You Can Do', 'What You Can Do', 'What You Can Do', 'What You Can Do', 'What You Can Do', 'What You Can Do'. The right screenshot shows the 'Military Service' section with a red arrow pointing to the 'Years of Service' field.

## Adding Value for the Organization: Use Metrics to Target Key Audiences

- ◆ Adding a user's engagement history to his/her profile enables surgical targeting of future outreach messages and calls to action.

The image shows a screenshot of a 'Criteria' selection interface. It includes a title 'Criteria' and a subtitle 'Use this tool to browse through your database of user profiles. You can set specific search criteria and pull up only those users you are interested in. If you wish to use all of the users in the database, please skip Step 1.' Below this is a list of criteria with dropdown menus for selection.

Criteria	Selection
Security Level	General Public (1)
Congressional District	Virginia (1)
Topic	Non-Death-Related
Topic	Any
Start Date	Any
End Date	Any
Health Delivery	Any
Delivery Suggested	Any
Fax Delivery	Any
Coordinator - Criminal Justice	Any
Coordinator - General	Any
Coordinator - Public Campaign	Any
Actions	Any

## CRM Best Practices: Things to Consider

◆ **If you allow users to indicate their preferences, respect those choices. Constituents react negatively to unsolicited email, which includes mailings that are more frequent than they requested, are off topic or in formats they do not want.**

## CRM Best Practices: Things to Consider

◆ **Internet users have become wary about sharing personal information, and the amount of information they are willing to provide has a direct relationship to the perceived value of what they will receive in return.**

- **Request the most basic and important information first, then provide opportunities to add to a profile as the relationship grows.**
- **Offer a variety of “products” in exchange for different levels of information.**

## CRM Best Practices: Things to Consider

- ◆ **To Segment or Not to Segment - How Much Information Should You Collect?**
  - **Pros of Segmenting Lists:**
    - Allows for highly targeted and personalized messaging
    - resulting actions can have higher political impact
    - decreases number of mailings received by each user
  - **Cons of Segmenting Lists:**
    - May miss opportunity to cross-recruit
    - Managing segmented lists requires more time and resources

## CRM Best Practices: Things to Consider

- ◆ **Relevant information about the constituent must be integrated into all touch points for the organization to ensure that every interaction is both consistent and appropriate.**
  - **Integrate or synchronize all databases (on- and off-line) on a timely basis.**
  - **Create a “style guide” for constituent interactions.**

## CRM Best Practices: Things to Consider

- ◆ One model won't necessarily fit all situations or work all of the time. Constantly review results to make sure your strategy is working.

Dramatic differences between the number of visits to a registration page and visits to a thank you page can indicate your process is too complicated or you are asking for too much information.

Rank	Document	Accesses	%	Bytes	%	Visits	%
1	<a href="#">http://www.bankofamerica.com/</a> (Reference)	45,462	88.84	3,725,247,881	94.53	42,892	87.88
2	<a href="#">http://www.bankofamerica.com/</a> (Reference)	1,704	3.38	10,473,455	0.27	1,670	3.43
3	<a href="#">http://www.bankofamerica.com/</a> (Reference)	1,494	2.87	11,268,789	0.29	1,364	2.79
4	<a href="#">http://www.bankofamerica.com/</a> (Reference)	1,350	2.55	128,848,841	3.27	1,235	2.52
5	<a href="#">http://www.bankofamerica.com/</a> (Reference)	1,012	1.92	6,151,093	0.16	257	0.52
6	<a href="#">http://www.bankofamerica.com/</a> (Reference)	439	0.82	3,361,048	0.09	408	0.83
7	<a href="#">http://www.bankofamerica.com/</a> (Reference)	344	0.65	1,579,587	0.04	216	0.45
8	<a href="#">http://www.bankofamerica.com/</a> (Reference)	232	0.43	1,768,882	0.04	204	0.42
9	<a href="#">http://www.bankofamerica.com/</a> (Reference)	177	0.33	40,534,581	1.10	137	0.28
10	<a href="#">http://www.bankofamerica.com/</a> (Reference)	157	0.30	139	0.00	94	0.19
11	<a href="#">http://www.bankofamerica.com/</a> (Reference)	130	0.25	683,087	0.02	96	0.20
12	<a href="#">http://www.bankofamerica.com/</a> (Reference)	65	0.12	269,435	0.01	59	0.12

### Calculator of Reports

#### Individual Reports

##### Generate Summary and

##### Details

##### Accessed by User

##### Accessed by IP

##### Top Documents

##### Top Referer Pages

##### Web Analytics Report of this

##### Website

##### Top Exit Pages

##### Web Analytics Report of this

##### Website

##### Documents and Directories

##### File Types (Extensions)

##### Accessed Directly

##### Top Visitor Status

##### Top Sites

##### as Estimated by Cookies

##### Top IP Addresses

##### Site Errors or "Not Found"

##### Top Operating Systems

##### Operating system making requests

##### Top Referring IP's