90 DAY CHECKLIST

01 — Set up your office

The first three months have likely been busy setting up your offices both on Capitol Hill and your district. Now is the time to make sure that you've filled all vital staff positions and that your district office has what it needs to run on a daily basis.

02 — Acquire all necessary hardware and software

Next on the agenda is purchasing and setting up all IT systems and software. Leidos offers IT hardware purchases as well as a House IT Services (HITS) monthly maintenance plan–combine both to receive free, on-site hardware installation. Once all of the necessary hardware is acquired, your office can focus on software needs and, perhaps most importantly, your CRM provider. It's important to thoroughly evaluate your CRM needs to choose the product that has everything you know you need and maybe a few features that you didn't even realize you needed. Once your CRM is up and running, be sure to establish contact and begin building a relationship with your office's IT Consultant (ITC). Introduce your ITC to the office so that everyone on staff knows who to escalate issues with.

03 — Train all office staff on IQ

At this point all staffers should be trained on IQ, including and especially Legislative Correspondents, Staff Assistants, and Communications Directors. Staffers should know how to create form letters, reply to messages, create documents, assign responses to advocacy campaign messages, and be able to remotely access IQ. Legislative Correspondents especially should be well-versed on IQ mail management.

04 — Establish daily internal processes

After physical office spaces are set up, major roles are filled, and everyone is trained, your office needs to focus on establishing internal process that will allow your day-to-day happenings to run smoothly. At the 90-day point in your term you should have established protocol for processing Member meeting/speaking requests, handling voicemails, responding to letters/emails, logging phone calls, approving form letter language, and booking D.C. tours for constituents. Your office should also compose autoreply language for responding to inbound messages and service requests.

05 — Integrate communication channels

First and foremost on every office's agenda is setting up all modes of communication and integrating them into their CRM. Make sure the webforms on your Member's website are properly linked to your CRM. Once you have all of your social channels up and running, be sure to connect those accounts to the IQ Social Media Center, so you can easily receive and respond to messages, monitor your feed, and view analytics all within IQ. Finally, before beginning any type of outreach, your office will need updated voter data imported directly into your CRM. Build up your database with the best 2018 election voter files and email lists, then easily import this data into IQ.

06 — Create a constituent outreach strategy

Once all of your channels are smoothly integrated and you have your voter data updated and stored where it is easily accessible in your CRM, it's time to focus on strategy. Your office should send out its first enewsletter to constituents, hold a Telephone Town Hall, distribute a press release, and set up your Eventbrite and IQ integration, so your calendar is always synced as your office begins planning events. Your office should also have a preliminary social media strategy in place to reach your constituents through Facebook, Twitter, Instagram, etc. as well as a draft calendar for when to promote certain topics and issues to your constituents via all of these channels.

If you have questions about any of these items, please reach out to your Leidos IQ contact or contact us via the information below.

703-206-0030 | house.sales@leidos.com | iq4congress.com

Intranet Quorum leidos