



Building a Constituent Relations Program

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Why excel in Constituent Services?

Perception is reality

Opportunity to engage outside of political context

Relationship building

Costs only our time



And...

IT'S WHY WE'RE HERE.



Setting the tone:

People are hurting & desperate

Government agencies and elected officials are seen as impersonal and untrustworthy

Technology – bulk email boxes, phone trees

“Don’t call us, we’ll call you.”

Loss of customer service culture in public sector

Remote work shortcomings



Challenge

Expectations regarding government and elected officials have never been lower.



Opportunity!

Record-low expectations are easy to exceed through sound constituent services.



Only Contact Rule

“Treat each outreach to your office as the only time that constituent will be in contact.”

Organized workflow

Coherence across positions – Constituent Services, Legislative Aide and interns (and Representative!)

24-48 hour response rule; other timetables

Reciprocate level of personal touch – handwritten letter vs crate of petitions. Form for form, personal for personal.

Look for personalization in form emails. (possible intern project).

On the Phone

Smile on the phone (It works and they can tell)

State who you are and who the representative is.

Empathy

Mirroring

Precision (get the details)

Guide the conversation as necessary but don't supplant.

Set parameters on duration if necessary.

Assume you're being recorded

On the Phone (cont.)

Set clear expectations every time:

“Will get you an answer even if it’s not the answer we are seeking”

I will need your _____. Here is how it will be used, and how long it will be retained.

I’ve typically seen a response from the department within _____.

Let me find that out vs. I don’t know

Never passive! “They’ll be in touch with you. Call me back in a few days if you don’t hear from them.”

Always take responsibility for next step:

“You will be hearing from me by Friday.”

Email

Similar rules to phone calls. (Smiling optional, but still helps).

Inflow management essential. Set up filters now for publications, updates, internal notifications, etc., so the constituent outreach stands out more.

Set up filters for mass communication

Look for personalizations even within mass emails (potential intern project)

Form for form.

If a constituent case is complex or raises a lot of questions, call vs email for more personal contact and often more efficient process.

Do research, consult Representative, department liaisons, policy staff & other resources!

Write well and seek professional development opportunities & help as needed.

Consider all emails public record.

Social Media

Whenever possible, staff should manage social media pages and look through regularly for constituent outreach/messages.

Search tags for potential engagement, critiques (which could become wins!)

Don't have constituent reach out on different medium – begin intake directly from platform.

You are speaking in voice of the Representative – this is the most visible medium

Most mud to slog through to get quality interactions

Be careful of time investment vs. value

Remember vagaries in law about public forums/representative personal pages

Assume everything you write is immediately turned into a screenshot.

General Intake Tips

“Let me find out” works.

You speak for the representative.

Consistency.

Mention the representative as an active participant in the process.

Sometimes calls are setups.

Execution

Expectations set appropriately – time to execute!

You are the advocate for your constituent.

Resources:

Department Liaisons

Multiclient & Corporate Lobbyists

Colleagues/staff with policy experience

Caucus Policy/Comms Teams

LSB Research

Third Party Research/Advocacy Groups - facilitative

Execution, cont.

Have as much information needed as possible in first outreach.

Be courteous to liaisons.

Don't leave to just email. Be kind but persistent.

Get time commitments whenever possible; names even better.

Organize with other staff/representatives if impediments to service are endemic.

Use discernment and involve other staff and representative as needed vs simply forwarding rote responses.

Synthesize and refine – create new email responses, check with liaisons or other sources on content forwards.

Follow Up



Implement courtesy follow up system

“I don’t have any news but letting you know that the representative and I are...”

Takes some time, saves you far more

Central to meeting expectations

Difficult Cases

Be even more sensitive to expressing empathy and mirroring

Accept you will often be the last call and picking up the pieces.

Offer multiple avenues for contact if a lot of information is required front end.

(Fax number to email – potential volunteer opportunity for scanning)

Clear expectations, as always!

Complete intake of information as much as possible.

Do what you say you will.

De-escalation principles.

Verbal abuse and threats are not part of your job description – set boundaries and screen such individuals – report as prescribed.

Frequent Fliers

Set expectations early in the call.

Show care and empathy.

Redirect if possible.

Consider additional resources.

Screening should be employed if needed to ensure other constituents are served. Outright blocking rarely necessary.

Courtesy to Constituents

Be respectful of constituent privacy and sensitive information.

Share your office's policy about use/retention of social security numbers, longform case document retention, etc., and then follow it.

“When is the best time for me to contact you?”

If you make a mistake, own up to it.

Warm vs cold referrals.

Bonus Tip 1: Apologize for excellence.

Bonus Tip 2: Serendipity Credit

Involving the Representative

When? All the time! “Representative _____ and I are...”

Consistently throughout the process.

Trends discussion, notables ongoing in staff meetings

Flag items immediately with external/pr implications

Intervention-based when required.

After successful completion of case. Road time, District work periods

Constituent case incumbency mail

Make sure the representative is on board with your program!

Constituent Outreach



Weaving incumbency tight...

Lamination Program

Booklet stations & schools

Constituent Contact Doors

Call Sheets

Clip and save

Generate workflow – consistency important

Testimonials – tell their stories

Coffee Hours/Town Halls



Decide open invite or by appointment

Staff presence essential – let the Representative listen

Assume you're being recorded

Self Care

Space out calls if possible, particularly if subject matter or conversation is highly emotional.

Utilize support services (peers, Business Office offerings, team building)

Look for signs of burnout.

Reward of organized workflow should be more work-life balance.

Final Thoughts



Constituent relations is and must remain the top priority in your office and customer service should be the foundation of that effort.

The representative will know whether or not they have an effective constituent relations program!



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