# STEP 4 – INFORMATION MANAGEMENT

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Step 4 of the 7-Step advocacy method concerns **Information Management**

Modern Public Affairs generates significant amounts of information and data. Managing this data is the focus of this video: How can you better manage your public affairs information?

In the last decade technology has revolutionized Public Affairs both in terms of increasing the amount of data we can access for our intelligence gathering and stakeholder mapping (Steps 2 and 3 respectively), but also in terms of how we coordinate and organize our advocacy. The list of advocacy software providers is growing rapidly with products ranging from all-in-one platforms (i.e. such as Quorum, FiscalNote etc.) to more specialized tools (i.e. Ulobby, PoliticoPro, One Policy Place etc.), to CRM and media analytics tools. Embracing these new tools represents one of the biggest potential areas of competitive advantage and professionalization in advocacy. Adopting and integrating these new tools is no longer optional. It is an absolute necessity!

Information Management, which is step 4 of the 7-step advocacy method, can be broken into two parts:

1. **Public Affairs Software**:
2. **Data Privacy**:

We will look at each of them in turn.

## Public Affairs Software

Our primary recommendation is to integrate within your practice a single public affairs software system to capture, store and share of all your advocacy information. This is the new best practice in public affairs today.

Adopting public affairs software represents a real culture change; a change in your way of working. For a transition to be successful, it is essential that you identify and train early adopters within your team. These 'power users' can integrate the new platform within your practice and encourage colleagues to feed the databases and use the software. A key

example is ensuring that everyone logs meetings with stakeholders. Ensuring everyone uses the system is crucial. The difficulty in overcoming human resistance to new practice and transitioning should not be underestimated. Getting a team on the same system will allow you to reap significant benefits.

Accessing, contextualizing and analyzing your data offers real added value to your advocacy and is best achieved through a single public affairs software system. This system is acquired, but most importantly built overtime through customization and inputting data. At its most basic, however, managing your advocacy data in one place for a campaign or strategy benefits you in four ways:

- **Storage:** Storing all your advocacy data in one place. Managed effectively this will save time and build efficiencies in your practice.
- **Access:** Increasing access to information. Data and advocacy assets are easy to find, as and when needed, often over several platforms (more on this later).
- **Institutional Memory:** Building an historical record of your campaign. Maintaining a historical memory is important in an industry with high staff mobility. These platforms represent an effective handover tool, facilitating the building staff skills and knowledge.
- **Analytics:** With your public and non-public advocacy data stored on a single platform you are able to undertake more sophisticated data analyses, including the possible application of AI and machine learning tools.

Whilst one of the main benefits is having a single digital information management system for public affairs across all issues and regulatory environments, there is also room for tailoring your tools to specific local needs. For example, you may need a monitoring tool that is local to a country. In such cases you must transfer this data into your primary public affairs system.

A key consideration when acquiring public affairs software is the capability of accessing data when 'on the move,' through multiple platforms (mobile phone apps being the most useful). Consider the benefits of accessing, through your mobile device, stakeholder contact information, key policy documents, but also crucially records of previous meetings. Also, when meeting stakeholders, consider the enormous added value of having a single mobile access point for advocacy assets across all your issues (get in touch if you want to know more).

Two benefits outlined above require further elaboration. Firstly, holding data in one place provides a historical record. You can see how positions and advocacy activities have evolved: what your positions used to be, what stakeholders did and said in the past. Secondly, it mitigates the impact of losing staff and the cost of on-boarding new staff. How many of us have taken on new jobs where there has been scant or no handover, and certainly no detail of the key stakeholders and what they said (and expected) in their last meetings? Having a single platform boosts your ability to rapidly brief new colleagues and maintain similar levels of professionalism and activity. Do not underestimate the financial impact of these benefits.

With a single platform that combines data from public sources (mainly through scraping and organizing data from websites) with your own non-public intelligence and stakeholder data, it is possible to make use of an emerging toolbox of data analytics. These tools radically reduce the cost of gathering and preparing intelligence data. From statistics on word frequency we move to more advanced analyses, such as sentiment analysis and social network analysis. New actors are emerging to capitalize on these emerging tools (i.e. VoteWatch or Eulytix). Artificial Intelligence (analyzing trends in data sets) and machine learning (organizing data and identifying patterns) represent the new frontier with first applications in public affairs and promises to allow us to make better predictions on voting behavior, socio-economic trends and advocacy outcomes. These tools will significantly improve the strategic planning capability of advocacy practitioners.

If the benefits are clear, why are so many organizations not making the leap to using single platforms?

1. **Resistance to change**: The use of single public affairs systems involves big changes in ways of working. More experienced staff may be unaccustomed to using software. Some may actively resist it! Onboarding is a crucial process that requires identifying and training early adopters and actively embedding the platform within day-to-day practice. Without comprehensive adoption, the platform will underperform. Successful adoption requires support from leadership and alignment with the agenda and drive of an organization.

2. **Data entry**: A vital extension of the first point, one of the biggest hurdles to the successful leveraging of a digital platform, is the discipline required (by everyone) to continually input data within the system. Systematically logging meetings and actions is vital. The platform can only be as strong as its weakest link.

3. **Cost**: New platforms come with a cost, often into the tens of thousands of Euros per platform, depending upon the number of licenses. Using multiple platforms can add significantly to your typical software licensing costs. Choosing software adapted to your resources means not only looking at the cost of each product, but also at the potential savings. Expensive platforms radically change your intelligence gathering and stakeholder mapping activities, saving time, money and shifting focus to more analytical work. Many platforms operate on a 'bolt-on' model. You buy a basic user license (usually on a user-fee basis) and then bolt on extra functionalities (i.e. monitoring of X number of issues in X number of countries).

4. **Data privacy**: Another cause for resistance may be concerns over the storage of sensitive data on stakeholders, but also relating to your own organization. These legitimate privacy concerns must be discussed with software providers.

Weigh up these considerations when looking to move into digital information management. There are significant economies of scale enjoyed from moving all of your activities into one platform. This is a rapidly evolving market with new services and new service providers entering the market each month, offering new ways for you to use your information and save time.

# Data Privacy

The second part of step 4 information management concerns the European Union General Data Protection (EUGDPR) legislation, which has significantly impacted the management of public affairs information (in the EU). GDPR applies when the information you are collecting and processing includes information on external parties (stakeholders or data subjects). By systematically collecting and organizing your data on a single platform you both increase the relevance of GDPR for your work as well as improve your capacity to remain in compliance. EUGDPR compliance is a complex process that requires detailed preparation. However, we can highlight some of the key considerations.

Firstly, your organization should develop a clear GDPR compliance policy, including the capability to provide external parties with access to their data (Article 15 of the GDPR). In doing so you should be able to explain:

- why you are collecting and processing the data,
- what kind of data you are collecting,
- where you got the data,
- how long you plan to keep that data.

People can ask to rectify or erase their personal data and they have the right to make a complaint to the supervisory authority. If using artificial intelligence or automated logic to make decisions about them, you need to explain how the logic works.

In addition to the financial risks (from a fine) you also run reputational risks if found to be infringing EUGDPR. It is an area that needs to be taken very seriously. We strongly urge you to ensure you receive legal advice to guarantee a high level of EUGDPR compliance. That said, we can outline some good practice for EUGDPR and information management:

1. **Public data:** Much of the data you will be collecting will be publicly available data on public figures such as politicians and high ranking officials. This shouldn't be affected by GDPR.
2. **Internal Policies:** Make sure you have internal policies on the data you collect. Are your staff aware of its implications? Who can access the data? Do you have a clear policy? Get legal advice.
3. **Security:** Make sure the data you hold is secure from third parties, notably from data breaches. Identify who is in charge of data protection. Discuss this with your digital system providers.
4. **Focus:** Review your procedures. Only collect, log and use personal information that is strictly required for your exercise of, for example, stakeholder mapping. Have you reviewed the data you hold? Can you explain why you need this data? Don't collect data for the sake of it.
5. **Access Rights:** Discuss with your software provider how to provide data subjects with access to their data. Can you download it easily? In what format? Be prepared to grant access to the data of any stakeholder who may request it.

In conclusion, when comparing the offering of the numerous software providers, consider the following factors:

- Is the software public affairs specific or business wide (i.e. also a CRM platform)?
- Do you favor an all-in-one approach and/or acquiring separate tools?
- Is your focus on accessing legislative and policy documents and information?
- Do you want a customizable stakeholder database?
- Does the platform offer policy timelines?
- Does the platform include a (social) media tracker tool?
- Does it include alerts and / or weekly / monthly updates?
- Does it include analysis and briefing (human intelligence data)?.
- Who many licenses are required by your team?
- Does it provide you with visualizations and/or more advanced data analytics?
- Is it customizable?  What functions and data can you add?

Weighing up these factors will help you identify the best solution for your needs and resources. However, remember that the quality of intelligence information is becoming harder to determine, while the quantity of information is increasing exponentially. The strategic consumption of information requires specific strategies and technological assistance to ensure it is filtered and packaged effectively.

In future videos we'll be exploring steps 5-7 to clearly define their purpose, but also to identify the key knowledge, skills, tools, and deliverables contained within them. To further explore our 7-steps of advocacy method as well as our free advocacy tools, including our free advocacy assessment 7-step snapshot report, please visit: www.advocacystrategy.com

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