Center for Strategic and International Studies (CSIS)

The Center for Strategic and International Studies (CSIS) is dedicated to providing world leaders with strategic insights on current and emerging global issues.CSIS addresses new challenges to national and international security, maintains resident experts on all of the world's major geographical regions and is committed to helping to develop new methods of governance for the global age.

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>
> MICHAEL KEARNS
> DIRECTOR OF
> DATA MANAGEMENT,
> CSIS

Nonprofit organizations serve a vital role in our society. Whether educational, cultural, religious or charitable, they focus their activities on crucial and worthwhile undertakings that otherwise might be ignored in a purely market-driven economy.

As much as any other type of entity, nonprofits depend upon relationships for their lifeblood. They must maintain a good rapport with contributors and members to ensure fiscal viability. They also rely upon their network of contacts and relationships for programming, staffing and other functions core to their charters.

All nonprofit groups recognize the value of relationships. But some, like the Washington, D.C.-based CSIS, are taking progressive, bold steps to ensure that they derive maximum value from them.

Establishing and Maintaining Ties

CSIS is a nonpartisan public policy research organization of over 150 people, dedicated to analysis and policy impact. Among other things the group provides strategic analysis to policymakers, organizes conferences bringing together world leaders to discuss the issues of the day, and builds structures for policy action.

To succeed in its mission, CSIS must proactively establish and maintain ongoing ties with some of the most powerful and influential people in the world. Ironically, one of the chief impediments the organization faced in achieving its goals was its underutilization of technology that fostered the relationship-building process.

According to MIS Director, Paul Kaufman, in 1998 CSIS recognized the need for a solution to this vexing problem. "Each of our internal groups managed information differently. Some used Microsoft Access, some used a FoxPro database, and others used dBase. In total, we were using 14 separate databases to manage our information. It became clear that we needed one system to help us better track donor information and new contacts as they become known to the organization."

Kaufman recalls that a consultant CSIS was working with at the time recommended LexisNexis® InterAction®, a customer relationship management (CRM) software product. InterAction had earned its reputation as the leading CRM tool geared specifically for professional users. Most CRM products were designed as sales force and call center automation for midlevel workers. After investigating InterAction more closely, CSIS determined that it was the ideal tool to help foster strategic relationships.

Cleaning House

Michael Kearns was hired as the organization's director of data management to help establish more effective information processes. His primary tool for accomplishing this objective would be InterAction.

Kearns recalls the disarray of the group's information systems when he first came onboard. "Communications between the different programs were breaking down. Sharing information was difficult. It was apparent to me that the only way to realize efficiency gains was to stop and analyze our processes, then implement a system that would support our goals."

Kearns' first order of business was to examine how CSIS managed one of its most important assets — its strategic relationships. Because the organization is nonpartisan, it needed a way to ensure that relationships on both sides of the political spectrum were being tended to properly. "It's a full-time job keeping the machine well-oiled — involving the right people and making sure we have coordinated all of our Capitol Hill relationships and included the correct people in our various programs. I felt that InterAction could reform this organization. Management responded, 'O.K., if you believe this, then make it happen.'"

Kearns' goal was to ensure that all employees who came into contact with donors and constituents in any way were storing the information they gathered in InterAction's centralized database. This would make it possible for all authorized users to easily access this data and share it for the benefit of others. "We have four management groups that focus externally to ensure that we are adequately serving our members. Employees from each of the programs use the system for tracking their relationship information and activities. This information is then available to everyone at an organizational level."

Managing Relationship Assets

Kearns says that once the data was in the system, program leaders could harness this "organizational wisdom" for relationship building. For instance, he has been creating a series of congressional reports with InterAction that update CSIS officials on key relationships. "I am trying to move us away from a management by crisis model. For example, previously if we learn at the last minute that a particular senator will be coming to a meeting, everyone would have to run around frantically trying to gather all the information we had about the senator in order to prepare for the meeting."

Kearns explains that now, all information about this relationship, such as notes from past activities and conversations, past attendance at events, and even minute personal detail, is stored in one place and can be accessed immediately. "With InterAction, we can generate reports that include all the information needed to brief us about that senator. Armed with this information, when preparing for meetings or going to Capitol Hill, our president knows whom he needs to talk with and what he needs to talk about."

Lorelei Schweickert, a coordinator for CSIS' European program, is responsible for monitoring her department's database, relationships, and publications, among other things. Schweickert says InterAction has fulfilled a strategic need. "It serves as our program's primary Rolodex, housing all of our contact information. It tracks our in-depth relationships and helps us monitor how we've interacted with donors. It also enables us to classify people based on anything from their specific areas of interest to what groups they belong to. This is critical when we're trying to determine whom to invite to a meeting or conference. Being able to share this information with our other programs is also very important."

CSIS has also benefited from functionality that harnesses InterAction's relational database. For instance, the system's Who Knows Whom feature lets users immediately identify other members within the organization who know a particular client or donor. "I can use Who Knows Whom to determine if my boss is acquainted with someone that I need to talk with. If he is, I can go directly to that person without having to bother my boss," says Kearns.

Return on Investment

Beyond creating an information infrastructure more conducive to relationship building and sharing, Kearns was also determined to drive down CSIS' costs and improve efficiency. In doing so, he could demonstrate to management a significant return on investment from InterAction.

Kearns first turned his attention to one of the most pervasive inefficiencies within the organization — mailings. "We've had lists for years, but we haven't been able to maintain them very well. Preparing for a mailing would take weeks. In most cases, the original list we were using wasn't great to begin with. Then people would have to ask around for additional names to add to it. It took a lot of time."

Moreover, because there were no processes for maintaining lists, they would not last very long. "The initial setup took a long time, but the shelf life was short — probably five or six months." InterAction provided CSIS with an entirely new opportunity to create and maintain lists, as well as execute mailings. Authorized users can click an icon to quickly see the mailing lists that any given contact was included in. To add a contact to a list, users simply clicked on the appropriate check box. The system's New Contact Wizard also promoted mailing list maintenance by prompting the user with mailing list options when a new contact is first being entered into the system.

Kaufman notes that fax and e-mail have also become significant components of CSIS' marketing mix. InterAction's broadcast fax and e-mail facilities, accordingly, have been extremely useful. "It's tied to our fax server and e-mail system. We broadcast about 20,000 faxes a week." Schweickert is a primary beneficiary of this integration. "There's a lot of interfacing between InterAction and Microsoft Word and our fax system. I'll just click on the appropriate options and fire them off. I hardly type any more! It has really saved us a tremendous amount of time and money. I rely on it. It's worth the investment because it can give back so much in return."

Focusing on Goals

Considering the breadth and depth of its work, CSIS operates a relatively small budget — about $18 million. Approximately two-thirds of that sum is earmarked for staffing and other fixed overhead such as rent. Kearns concludes that any tool capable of helping his organization cut down on expenses ultimately benefits its members. "Everything we can save in terms of time and effort means more time for creating. Instead of spending all that time faxing, mailing, preparing name tags and writing letters, our program coordinators can participate in their events, communicate with attendees, and spend time briefing those who did not attend. The efficiencies InterAction delivers provide us more time to build stronger relationships. I have a very clear sense that the returns it provides are immeasurable."