STATECRAFTCRM

Field Guide

The Complete Operating Manual for Government Affairs Teams

Operating promise: Know who matters, what changed, what was promised, and what must happen next.

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HOW TO USE THIS GUIDE

One operating model. Three ways to learn.

Use the five-minute Quick Start when you need value immediately. Use the feature chapters when you are performing a specific job. Use the role paths when onboarding a practitioner, leader, administrator, executive, new hire, or Demo Lab presenter.

Source of truth: The public Help Center is continuously updated. This PDF is the stable versioned reference. If behavior differs, verify the current Help Center article and contact support.

Environment check

- Customer workspace: real authorized team data; normal provider actions may be available according to role and plan.
- Synthetic Demo Lab: violet banner is always visible; every person and organization is fictional; external sending, purchasing, geocoding, AI generation, and uploads are blocked.
- Never paste customer or prospect data into the Demo Lab.

Contents

FIVE-MINUTE QUICK START

Create one connected story before importing everything.

1. Choose the live issue, stakeholder relationship, or leadership question that matters this week.
2. Create the issue with priority, status, desired outcome, and the next real deadline.
3. Add one stakeholder and connect the person to the issue.
4. Log the latest interaction, including the ask, commitment, next action, and date.
5. Open Command Center and confirm the issue, relationship, deadline, or follow-up signal appears.

Useful outcome: A teammate can see who matters, what happened, what is due, and who should move next without asking for a separate spreadsheet.

The connected operating model

Object	Question it answers	Connects to
Contact	Who is this person and what is the relationship state?	Organization, issues, interactions
Organization	What durable institution shapes this work?	Contacts
Issue	What outcome, deadline, or proceeding are we managing?	Contacts, interactions, events
Interaction	What happened, what was asked, and what comes next?	Contacts, issues
Event	When and where must the team prepare or act?	Contacts, issues, attendees

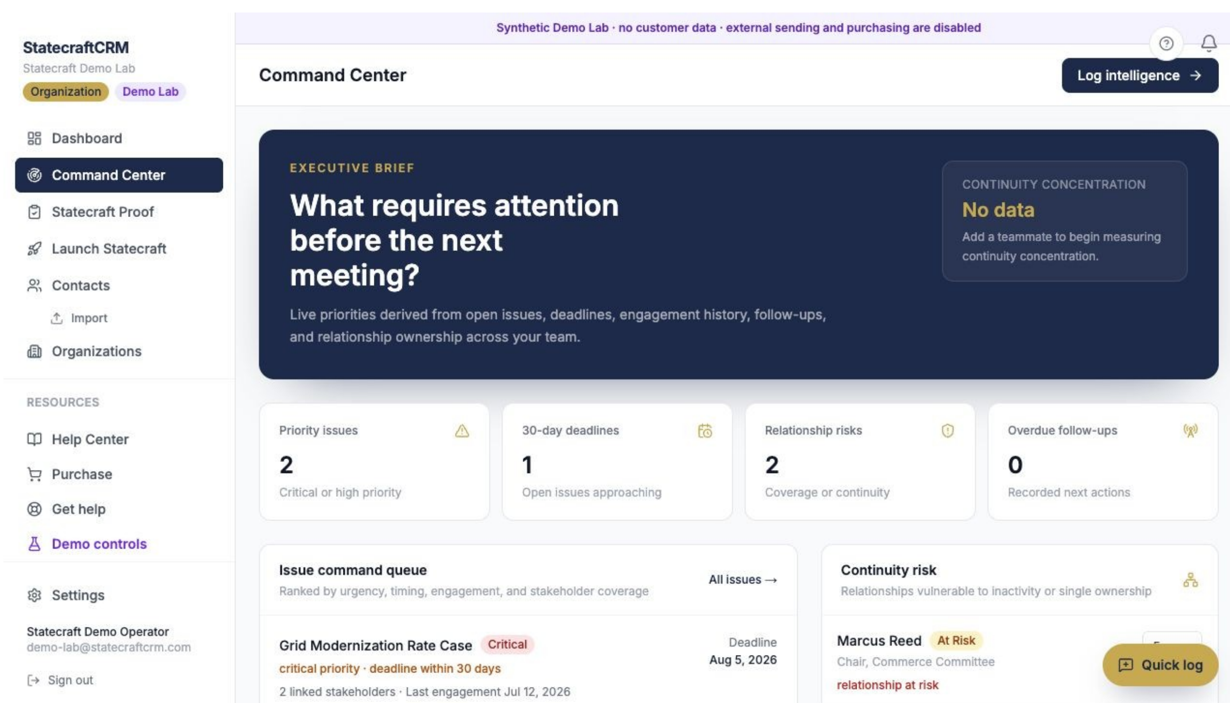
Command Center

Outcome: Know what requires attention before the next meeting.

What it is	An executive exception view derived from priority issues, deadlines, engagement history, next actions, relationship risk, and ownership concentration.
Best used when	Daily triage, weekly team review, executive preparation, and new-hire orientation.
Who can use it	Any verified workspace member.
Plan / permission	Evaluation, Team, Organization, and Enterprise.

How to use it

1. Open Command Center.
2. Scan priority issues, 30-day deadlines, relationship risks, and overdue follow-ups.
3. Open the highest-consequence signal.
4. Verify the source issue, stakeholder, or interaction.
5. Assign or update the next action and return to the review.



Synthetic Utility Rate Case scenario. The violet banner confirms the isolated Demo Lab.

Government-affairs example

The Grid Modernization Rate Case is critical, has a deadline inside 30 days, and exposes a relationship risk with the committee chair. Leadership can decide whether to supply air cover before the next hearing.

Expected result

The team leaves with a short exception queue, clear owners, and current next actions.

Common mistakes

- Treating the dashboard as an automatic policy conclusion.
- Reviewing stale source records without correcting them.
- Using the weekly meeting for live data entry instead of decisions.

Related: Issues, Interactions, Contacts, Calendar, Notifications, Weekly Activity Report.

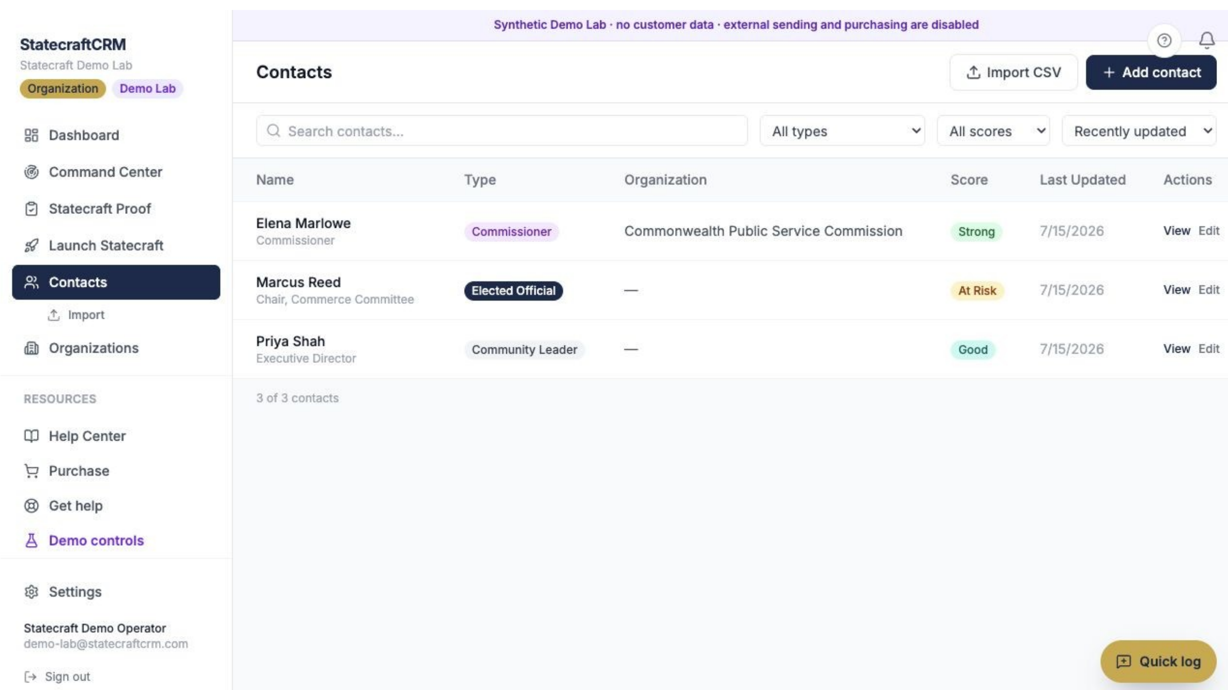
Contacts and relationship intelligence

Outcome: Give the next reader the relationship context needed for a better conversation.

What it is	The person-level record for durable identity, role, organization, stakeholder type, relationship score, geography, issues, and interaction history.
Best used when	Before outreach, after a role change, during stakeholder mapping, and when transferring institutional knowledge.
Who can use it	Editors and administrators maintain records; viewers can read them.
Plan / permission	Core contact records are available on every plan.

How to use it

1. Search before creating a new record.
2. Enter durable identity and role facts.
3. Choose the current relationship score honestly.
4. Connect the organization and relevant issues.
5. Keep meetings, asks, commitments, and next actions in Interactions.



Three fictional stakeholders with distinct relationship states.

Government-affairs example

Commissioner Elena Marlowe is marked Strong because access, trust, and responsiveness support the rating—not because the team expects policy agreement.

Expected result

A teammate can prepare without searching private notes or asking who knows the stakeholder.

Common mistakes

- Creating duplicates instead of searching.
- Using notes as a meeting transcript.
- Inflating relationship scores.
- Storing credentials or unrelated sensitive data.

Related: Organizations, Tags, Issues, Interactions, Briefings, Heatmap.

Organizations and tags

Outcome: Make institutional and cross-cutting stakeholder context reusable.

What it is	Organizations hold institution-level context; tags provide a governed vocabulary for recurring groups not already represented by type, geography, organization, or issue.
Best used when	Mapping agencies, coalitions, associations, regions, programs, or internal stakeholder groups.
Who can use it	Editors and administrators maintain; viewers review.
Plan / permission	Available on every plan.

How to use it

1. Search for the canonical institution before creating it.
2. Use the formal organization name and closest supported type.
3. Connect multiple contacts to one organization.
4. Create only reusable tags.
5. Document naming conventions and retire redundant variants deliberately.

Government-affairs example

Use one Commonwealth Public Service Commission organization connected to its commissioners and staff. Use a tag such as Affordability Coalition only if it cuts across multiple issues or organizations.

Expected result

People remain connected to the durable institutions and segments that shape the work.

Common mistakes

- Creating spelling variants as separate organizations.
- Using tags to duplicate fields already modeled elsewhere.
- Letting every user invent new tag vocabulary.

Related: Contacts, Imports, Issues, Heatmap.

Contact import

Outcome: Move a clean, authorized CSV into Statecraft once and inspect the result.

What it is	A mapped CSV workflow with preview before records are created.
Best used when	Launching a team from a controlled spreadsheet or adding a well-defined stakeholder set.
Who can use it	Administrator or editor.
Plan / permission	Team, Organization, and Enterprise. Use Statecraft Proof when you want assessment without import.

How to use it

1. Use one stakeholder per row with a clear header.
2. Remove empty summary rows and merged cells.
3. Open Contacts > Import and upload the CSV.
4. Map every source column and inspect sample rows.
5. Confirm once, then inspect the resulting contacts and organizations.

Government-affairs example

A utility imports the 80 external stakeholders involved in one rate case before expanding into its full historical archive.

Expected result

A reviewable first stakeholder map without repeated imports or hidden transformations.

Common mistakes

- Importing the same file repeatedly after an error.
- Mapping relationship values without reviewing supported options.
- Trying to migrate every historical file before proving the first operating outcome.

Related: Contacts, Organizations, Statecraft Proof, Get Help.

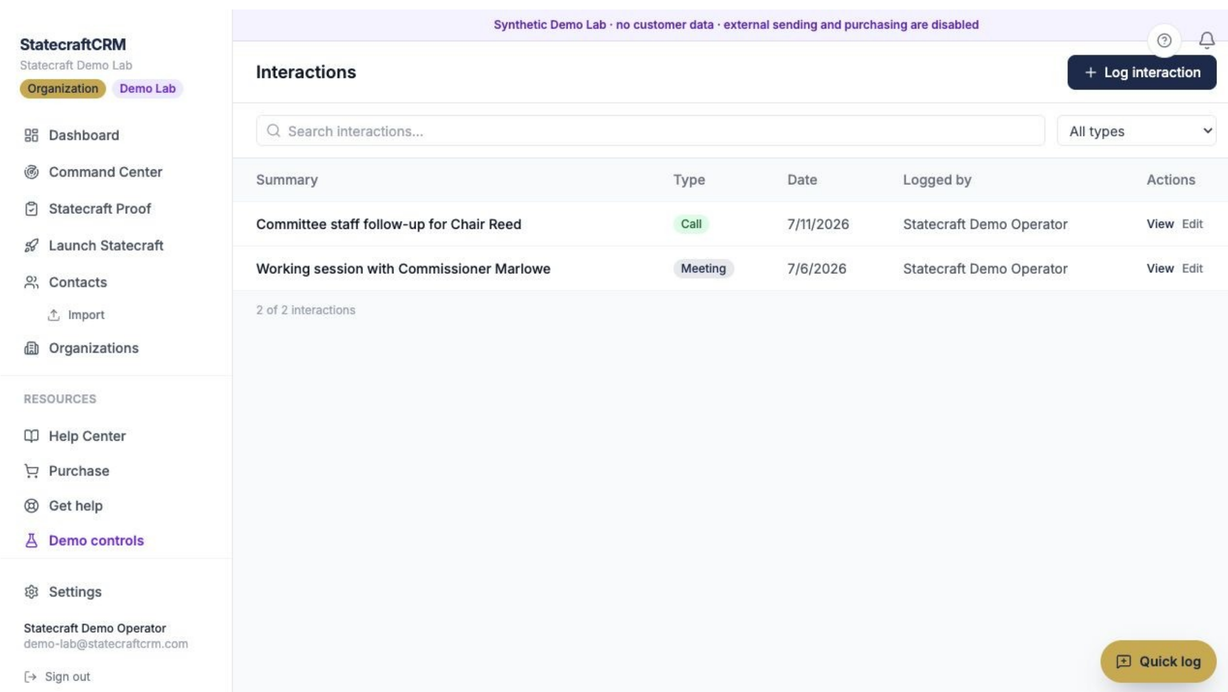
Interactions and Quick log

Outcome: Turn conversations into institutional memory and owned follow-through.

What it is	The dated operating record of meetings, calls, emails, hearings, events, asks, outcomes, commitments, and next actions.
Best used when	Immediately after material stakeholder activity.
Who can use it	Editors and administrators create or edit; viewers review.
Plan / permission	Available on every plan.

How to use it

1. Choose the interaction type and date.
2. Write a one-sentence signal summary.
3. Capture discussion, ask, outcome, and next action when applicable.
4. Set a real next-action date.
5. Link every relevant stakeholder and issue.



Synthetic interaction history for the Utility Rate Case scenario.

Government-affairs example

After committee staff asks for district-level affordability data, the practitioner records the request, assigns the follow-up, and dates it before the hearing.

Expected result

Anyone can reconstruct what happened and what must happen next.

Common mistakes

- Writing a transcript instead of the decision-relevant signal.
- Leaving the next action vague or undated.
- Failing to connect the interaction to contacts and issues.

Related: Contacts, Issues, Command Center, Notifications, Weekly Report.

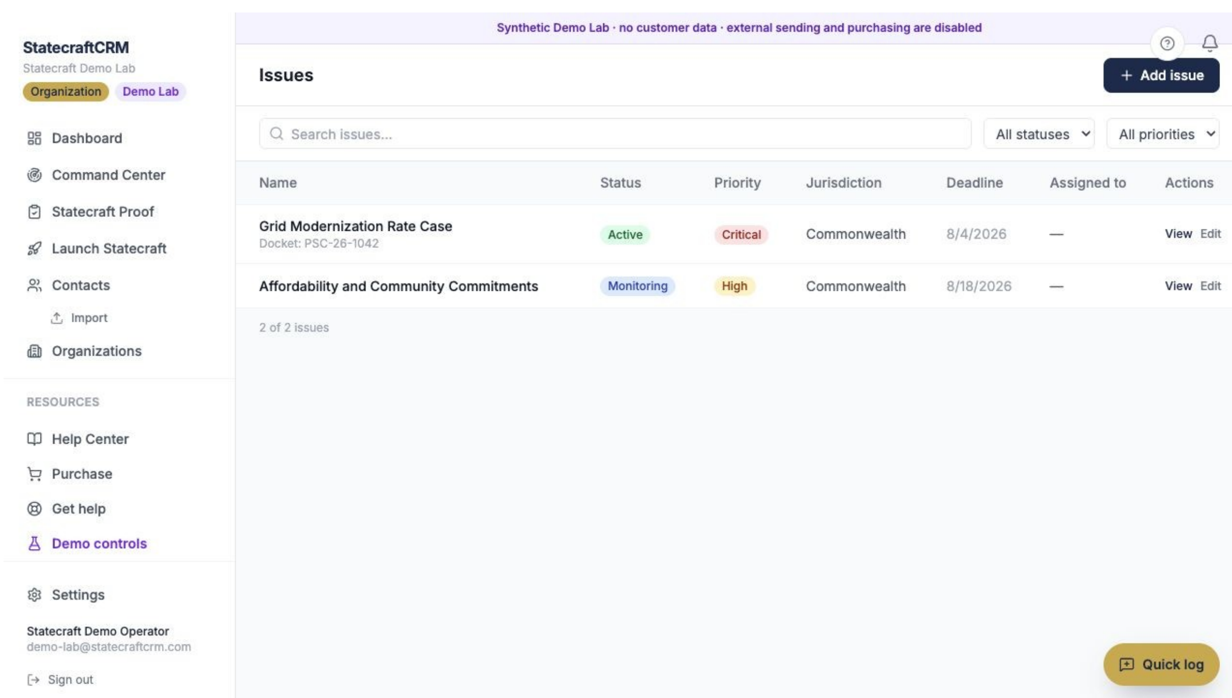
Issues and proceedings

Outcome: Connect policy movement to stakeholders, deadlines, position, and action.

What it is	The shared record for an issue, proceeding, docket, desired outcome, priority, status, jurisdiction, deadlines, hearings, and linked activity.
Best used when	A policy or regulatory matter requires coordinated relationship work.
Who can use it	Editors maintain; viewers and executives review.
Plan / permission	Available on every plan.

How to use it

1. Name the issue in plain language.
2. Set the supported priority, status, jurisdiction, and organization position.
3. Add docket, deadline, and hearing data when real.
4. Describe the desired outcome and material context.
5. Connect stakeholders and interactions as movement occurs.



The canonical Demo Lab scenario contains one critical proceeding and one cross-cutting affordability issue.

Government-affairs example

The Grid Modernization Rate Case record connects PSC-26-1042, the hearing date, affordability commitments, commissioner context, and committee follow-up.

Expected result

The team can explain policy state and relationship strategy from one connected record.

Common mistakes

- Using notes as the only source of status.
- Creating one issue for every task.
- Leaving deadlines or hearings stale after public movement.

Related: Contacts, Interactions, Calendar, Command Center, Reports.

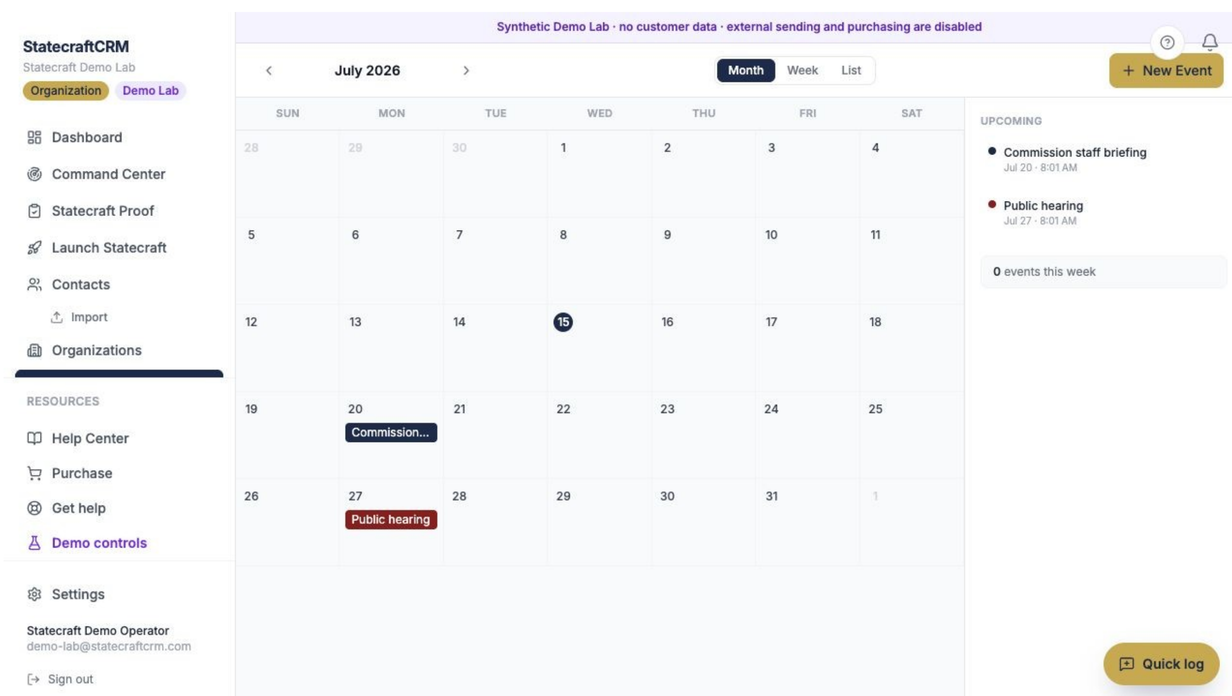
Calendar and deadlines

Outcome: See hearings, meetings, site visits, and internal milestones in one operating calendar.

What it is	A team calendar that connects events to stakeholders, issues, attendees, location, and preparation notes.
Best used when	The team needs a scheduled object around which preparation or attendance is coordinated.
Who can use it	Editors and administrators create; all members review.
Plan / permission	Available on every plan.

How to use it

1. Open Calendar and choose the date.
2. Select the event type and time.
3. Connect stakeholders, issues, and attending teammates.
4. Add location and preparation notes.
5. Confirm the event in month, week, or list view.



Synthetic commission briefing and public hearing generated relative to the reset date.

Government-affairs example

The staff briefing occurs one week before the public hearing, giving the team a visible preparation window.

Expected result

Policy milestones and relationship activity share one timeline.

Common mistakes

- Relying only on an issue deadline when attendees and preparation are needed.
- Creating duplicate events instead of updating the canonical record.

Related: Issues, Interactions, Command Center.

Relationship Heatmap

Outcome: Identify geographic, issue, and engagement coverage gaps.

What it is	A visual map of contacts with coordinates, relationship states, issue filters, and dormancy signals.
Best used when	Planning regional coverage, site visits, coalition activity, or leadership attention.
Who can use it	Any Organization or Enterprise member; geocoding requires editor or administrator rights.
Plan / permission	Organization and Enterprise. External geocoding is blocked in Demo Lab.

How to use it

1. Ensure supported contact coordinates are present.
2. Open Heatmap.
3. Filter by issue or relationship state.
4. Inspect dormant or weakly covered areas.
5. Create the appropriate outreach or ownership action.

Government-affairs example

A multi-jurisdiction team filters to one infrastructure issue and sees that community-leader coverage is concentrated in the capital region.

Expected result

A visual hypothesis about coverage that can be verified against the operating record.

Common mistakes

- Treating missing coordinates as missing relationships.
- Using the map without an operating question.
- Assuming proximity equals influence.

Related: Contacts, Tags, Issues, Command Center.

Stakeholder briefings

Outcome: Prepare a fact-checked meeting draft from connected history.

What it is	An AI-assisted draft built from the stakeholder record, linked issues, and recent interactions.
Best used when	Preparing for a high-consequence meeting after the source record is current.
Who can use it	Organization and Enterprise members.
Plan / permission	Organization and Enterprise. Live AI generation is blocked in Demo Lab.

How to use it

1. Open the stakeholder record.
2. Verify title, organization, relationship score, issues, and recent interactions.
3. Open Briefing and enter purpose, date, and tone.
4. Generate the draft.
5. Fact-check, remove inappropriate sensitive content, and apply professional judgment.

Government-affairs example

Before meeting Commissioner Marlowe, the practitioner requests a concise briefing focused on affordability evidence and the next staff milestone.

Expected result

A preparation draft grounded in the shared record, not a blank page.

Common mistakes

- Generating before updating the source record.
- Treating the draft as legal advice or verified external fact.
- Including sensitive data that is unnecessary for preparation.

Related: Contacts, Interactions, Issues, Security.

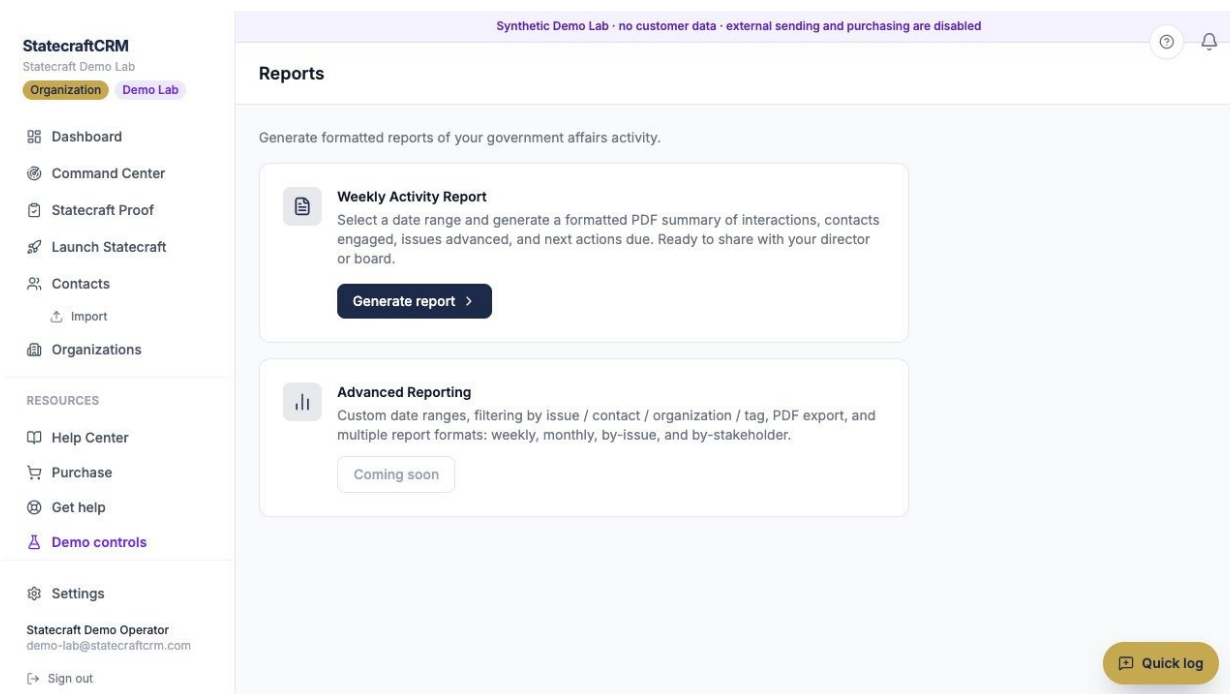
Weekly Activity Report

Outcome: Create a leadership-ready PDF from the recorded week.

What it is	A configurable report of interactions, contacts engaged, issues advanced, and next actions due.
Best used when	Weekly leadership reporting, board preparation, or team review.
Who can use it	Any member on a paid plan.
Plan / permission	Team, Organization, and Enterprise. Advanced Reporting remains marked Coming soon.

How to use it

1. Open Reports > Weekly Activity Report.
2. Choose the date range.
3. Confirm report title and sections.
4. Generate the report.
5. Correct source records and regenerate before sharing if needed.



Weekly Activity Report is live; Advanced Reporting is explicitly labeled Coming soon.

Government-affairs example

A director generates last week's activity for the executive team after owners correct two missing next actions.

Expected result

Leadership receives a consistent output derived from the same record the team operates.

Common mistakes

- Representing Advanced Reporting as available.
- Sharing before reviewing source completeness.
- Using reports as a substitute for current daily records.

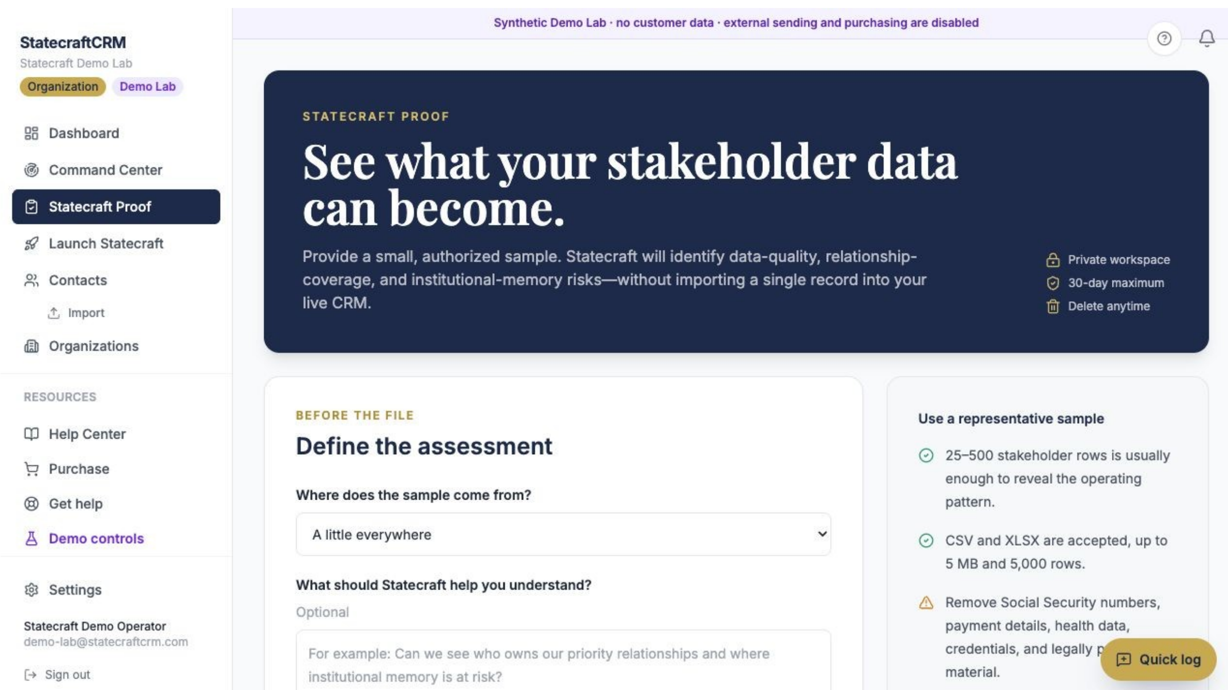
Related: Command Center, Weekly Review, Interactions, Issues.

Statecraft Proof

Outcome: Assess an authorized sample without importing it into the CRM.	
What it is	A private, consent-based, time-limited workspace for data-quality, relationship-coverage, and institutional-memory assessment.
Best used when	A prospect or customer wants evidence before migration or wants to understand a representative sample.
Who can use it	The verified workspace member who owns the Proof workspace.
Plan / permission	Available through the implemented Proof path. Uploads are blocked in Demo Lab.

How to use it

1. Choose the source system and assessment objective.
2. Read and accept the current consent statement.
3. Upload only an authorized representative CSV or XLSX sample.
4. Review mapping, quality metrics, and preview.
5. Delete immediately when finished or rely on the documented maximum retention window.



Proof states the privacy, retention, and sample boundaries before file upload.

Government-affairs example

A team supplies 100 authorized stakeholder rows to test ownership and institutional-memory risk before approving a migration.

Expected result

A bounded assessment without creating live CRM contacts, organizations, issues, or interactions.

Common mistakes

- Uploading data without authorization.
- Including credentials, payment details, health data, or privileged material.
- Confusing Proof with an automatic production import.

Related: Import, Security, Support, Purchase.

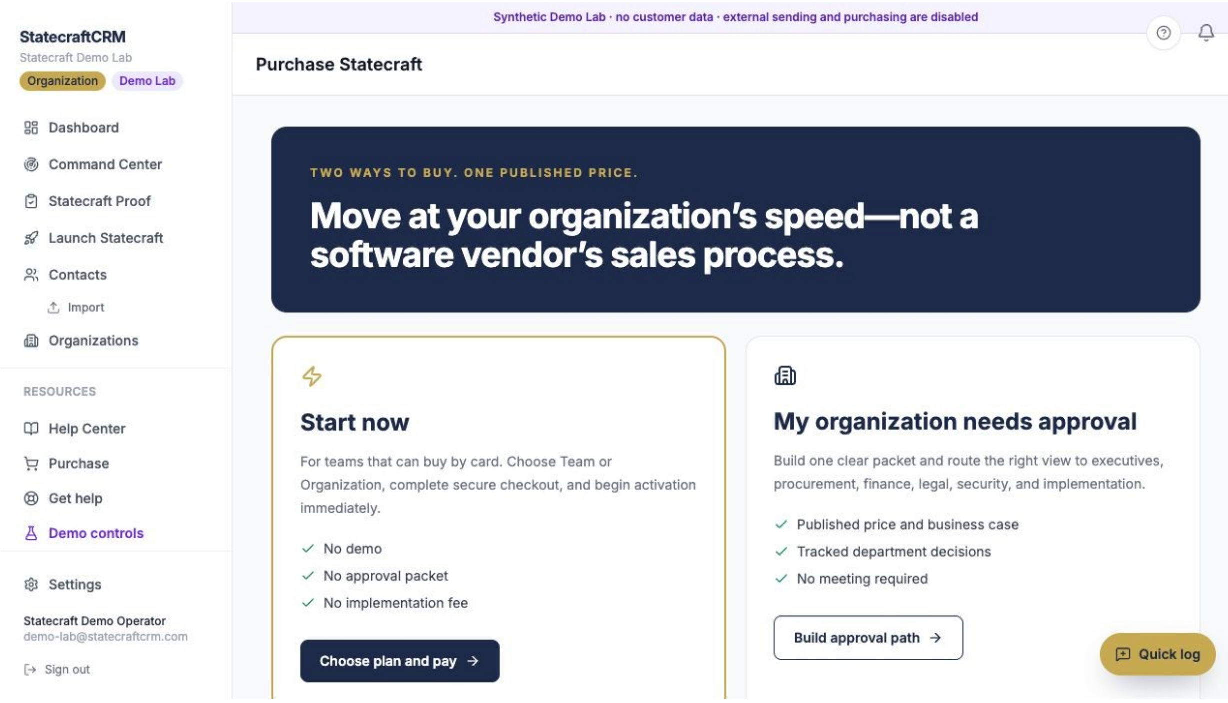
Purchase and approval paths

Outcome: Buy directly or route the exact internal decision path without a mandatory demo.

What it is	Two buyer-controlled paths: secure published checkout for Team or Organization, and a structured approval workspace for organizations that require internal review.
Best used when	A qualified buyer is ready to purchase or coordinate procurement, finance, legal, security, or implementation review.
Who can use it	Verified workspace administrator.
Plan / permission	Team and Organization have published direct paths; Enterprise is scope-based. External routing and checkout are blocked in Demo Lab.

How to use it

1. Choose Start now or My organization needs approval.
2. Confirm the plan, billing interval, buyer, and legal organization.
3. For direct purchase, continue to secure checkout.
4. For approval, add only required departments and reviewers.
5. Review before explicitly sending private, expiring links.



The buyer chooses the path. A meeting is optional, not a gate.

Government-affairs example

A three-person association chooses Team and pays by card. A regulated utility creates an Organization approval workspace for security, procurement, and finance.

Expected result

The buying process matches the customer's internal reality without manufactured sales friction.

Common mistakes

- Claiming an approval link signs a contract or charges a payment method.
- Adding departments that do not need to decide.
- Presenting unapproved Terms or Privacy documents as final customer paper.

Related: Plans, Billing, Activation, Security, Support.

Launch Statecraft

Outcome: Reach the first useful operating result instead of merely completing setup clicks.

What it is	Guided activation paths for Evaluation, Team, Organization, Enterprise, and new hires.
Best used when	Immediately after signup, purchase, or invitation into a team.
Who can use it	The workspace owner leads; team members complete assigned operating actions.
Plan / permission	All plans; path depth changes by plan and context.

How to use it

1. Name the first operating outcome.
2. Add or import the first useful stakeholder set.
3. Create the first priority issue.
4. Invite the people who maintain the record.
5. Log a real interaction and review Command Center.
6. Declare go-live when the team can find history and next actions without the spreadsheet.

Government-affairs example

A healthcare association launches around one access issue and its 25 priority stakeholders before migrating its archive.

Expected result

The team experiences value early enough to build an operating habit.

Common mistakes

- Importing everything before choosing an outcome.
- Treating activation as an administrator-only checklist.
- Calling a workspace live before records can answer a real question.

Related: Quick Start, Import, Team Invitations, Command Center.

Team access, roles, and billing

Outcome: Give each person the least access needed and keep plan state tied to verified billing events.

What it is	Administrator, editor, and viewer roles; per-plan seat limits; secure checkout and billing portal; signed Stripe webhook plan updates.
Best used when	Adding or removing people, changing plan, reviewing access, or managing invoices and payment methods.
Who can use it	Administrators manage access and billing; members use individual credentials.
Plan / permission	Evaluation: 1 user. Team: up to 3. Organization: up to 10. Enterprise: scoped.

How to use it

1. Open Settings > Members.
2. Confirm seat capacity and choose the least-privileged suitable role.
3. Send the individual invitation; never share a login.
4. Use Billing for checkout or the secure portal.
5. Review privileged changes in Audit log and remove obsolete access.

Government-affairs example

A new analyst receives editor access while an executive receives viewer access. The administrator retains membership and billing control.

Expected result

The team can collaborate without shared credentials or ambiguous ownership.

Common mistakes

- Giving administrator access by default.
- Leaving former employees active.
- Assuming a client-supplied team identifier grants access.

Related: Security, Audit, New-hire onboarding, Purchase.

Security, audit, and data handling

Outcome: Operate with team-scoped access, reviewable privileged actions, and explicit sensitive-data boundaries.

What it is	Server-verified team authorization, database row-level security, validated and rate-limited sensitive routes, append-only audit events, and bounded retention workflows.
Best used when	Access review, security review, incident triage, procurement, Proof, support, and offboarding.
Who can use it	All members follow handling rules; administrators own access and audit review.
Plan / permission	Authorization and RLS apply across plans. Audit log is administrator-only.

How to use it

1. Use individual credentials and least privilege.
2. Keep sensitive data out unless it is necessary and authorized.
3. Review Audit log for privileged workflows.
4. Use Proof retention and deletion controls for samples.
5. Report suspected access or data issues through the monitored support path.

Government-affairs example

An administrator investigates an unexpected purchase action by preserving the audit timestamp, actor, action, and target before escalating.

Expected result

Sensitive workflows are explainable and scoped to verified membership.

Common mistakes

- Putting API keys or passwords in notes or support.
- Treating an audit log as a replacement for access review.
- Claiming Statecraft provides legal advice or guarantees policy outcomes.

Related: Roles, Audit log, Proof, Support, Purchase approvals.

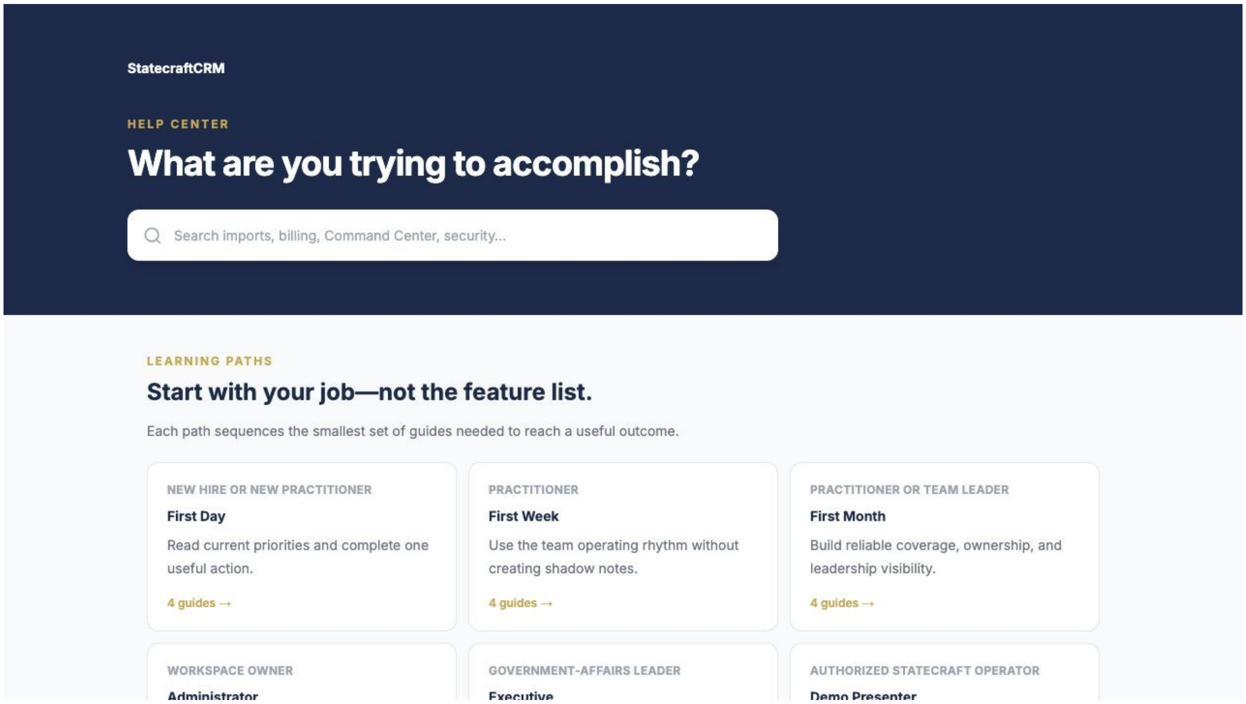
Help Center and human support

Outcome: Resolve routine work quickly and escalate with enough context for a useful human response.

What it is	A public, searchable, versioned task library plus authenticated team-scoped support cases.
Best used when	Learning a workflow, troubleshooting, onboarding a teammate, or reporting a reproducible problem.
Who can use it	Help Center is public; any authenticated member can submit support outside Demo Lab.
Plan / permission	All plans. Support submission is disabled in Demo Lab.

How to use it

1. Use the page-specific question-mark link or open Help Center.
2. Search for the outcome, role, plan, or feature.
3. Follow the numbered procedure and related next step.
4. If unresolved, describe the intended outcome, expectation, actual result, and page.
5. Do not include credentials, full payment details, or sensitive source files.



Role-based paths lead with the user's job instead of a feature parade.

Government-affairs example

A new hire follows First Day, reads Command Center and two stakeholder histories, then logs one reviewed action.

Expected result

Users can reach a useful answer while recurring questions become reusable knowledge.

Common mistakes

- Searching only by the exact button label.
- Submitting secrets or unnecessary sensitive data.
- Treating a planned capability as live because it appears in a roadmap.

Related: Every product workflow, Get Help, System Status.

PLANS AND PERMISSIONS

Commercial and access source of truth

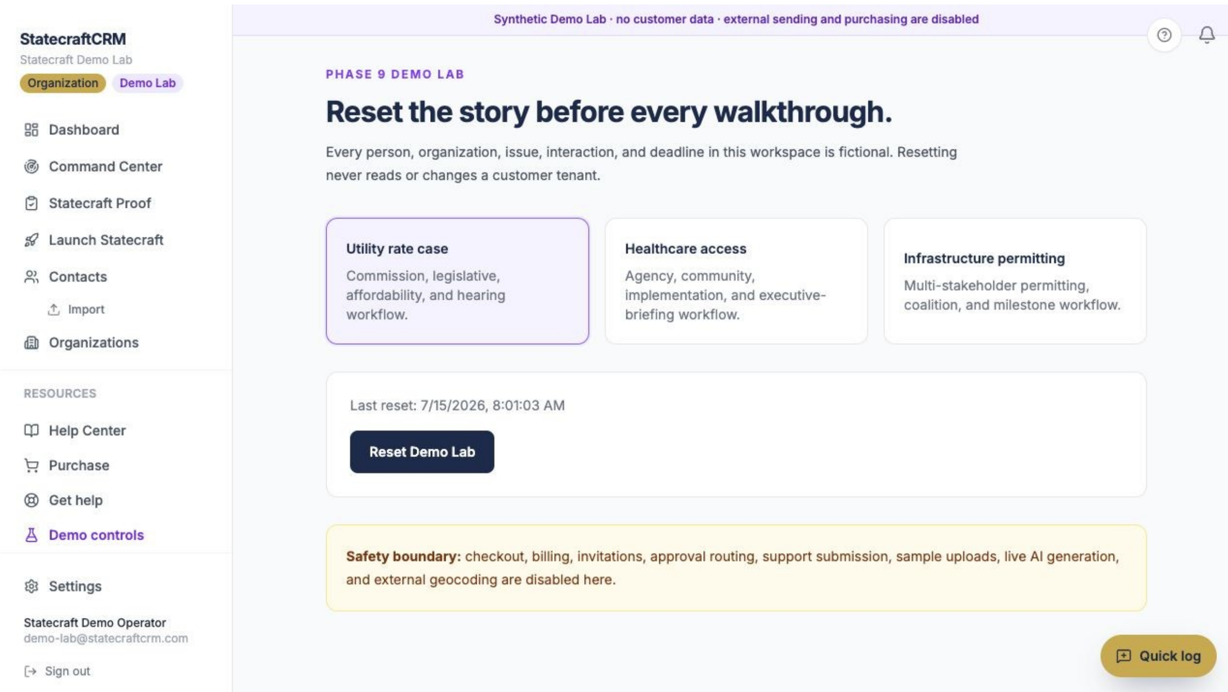
Plan	Monthly	Annual	Included users
Evaluation	Not a public forever-free tier	Limited evaluation	1
Team	$399	$4,188	Up to 3
Organization	$1,500	$15,000	Up to 10
Enterprise	$3,500 equivalent	From $42,000	Scoped

Role	Expected work	Sensitive controls
Administrator	Membership, settings, billing, privileged workflows	Invites, access review, billing, audit
Editor	Maintain contacts, issues, interactions, events, and context	No billing or membership administration
Viewer	Read shared intelligence and leadership outputs	No core-record changes

Plan boundary: Heatmap and AI Briefings require Organization or Enterprise. CSV import requires Team or above. Weekly Activity Report is live on paid plans. Advanced Reporting is planned and labeled Coming soon.

DEMO LAB OPERATOR MANUAL

Run the walkthrough from a clean synthetic story.



Use Demo controls before and after every walkthrough.

Before the call

1. Sign in only with the dedicated Demo Lab identity stored in the protected operator credential file.
2. Confirm the violet Synthetic Demo Lab banner is visible.
3. Open Demo controls and choose Utility rate case, Healthcare access, or Infrastructure permitting.
4. Select Reset Demo Lab.
5. Open Command Center and confirm the scenario contains 3 contacts, 2 issues, 2 interactions, and 2 events.
6. Close unrelated tabs, desktop notifications, and private notes before sharing.

The twenty-minute connected walkthrough

Time	Screen	What to accomplish
0-2	Opening	Ask what the team must know before its next leadership or stakeholder meeting.
2-5	Command Center	Show the end state: priorities, deadlines, relationship risk, and overdue action.
5-8	Issue	Open Grid Modernization Rate Case; connect outcome, docket, deadline, hearing, and stakeholders.
8-12	Contact	Open Elena Marlowe; show durable context, relationship score, issues, and history.
12-15	Interaction	Show the ask, commitment, next action, date, and shared ownership.
15-20	Decision	Return to Command Center and choose Build, Proof, direct purchase, approval path, or optional working session.

Presenter rules

- Tell one connected story. Do not parade every feature.
- Use the buyer's language, then map it to the closest synthetic scenario.
- Never paste prospect or customer information into the Demo Lab.
- Do not attempt to bypass blocked checkout, billing, invitation, approval, support, Proof upload, AI, or geocoding actions.
- Reset the scenario immediately after the walkthrough.

ROLE-BASED ONBOARDING

First Day, First Week, First Month

First Day

1. Read Command Center.
2. Open the highest-priority issue.
3. Read two stakeholder histories.
4. Identify one upcoming or overdue action.
5. Complete one reviewed useful action.

First Week

1. Learn naming and tagging conventions.
2. Review active issues and relationship risks.
3. Log real interactions within one business day.
4. Use Quick log for short follow-ups.
5. Join the weekly Command Center review.

First Month

1. Confirm every priority issue has current owners, stakeholders, deadlines, and next actions.
2. Review dormant or at-risk relationships.
3. Resolve duplicate or incomplete records deliberately.
4. Review ownership concentration.
5. Convert recurring questions into a convention or Help Center improvement.

Adoption test: A new hire is productive when they can understand current work and complete a useful action inside the shared system—not when they have clicked every navigation item.

TROUBLESHOOTING AND REFERENCE

Troubleshoot without creating more risk

Symptom	First check	Safe next step
Cannot see a record	Correct workspace and membership	Ask an administrator; do not change the URL team ID.
Import error	Header, supported values, and preview	Stop repeated imports and contact support with the column name.
Map is empty	Contact coordinates and Organization plan	Correct supported contact location data.
Report is incomplete	Source interactions and selected dates	Correct source records and regenerate.
Invite is blocked	Administrator role and seat capacity	Adjust access or plan through the supported path.
Demo action is disabled	Violet Demo Lab banner	This is expected; never bypass the safety boundary.

Glossary

Command Center: Executive exception view derived from the operating record.

Interaction: A dated stakeholder activity with context, outcome, and next action.

Relationship score: Current access, trust, and responsiveness—not expected policy agreement.

Statecraft Proof: Isolated, consent-based sample assessment that does not import live CRM records.

Evaluation: Internal limited workspace identifier; not a public forever-free commercial tier.

Demo Lab: Dedicated isolated tenant containing only fictional synthetic data and blocked external actions.

Buyer documents

Terms of Use and Privacy Agreement are required buyer documents but remain pending owner- and counsel-approved final versions. Do not invent, publish, or route them as final customer paper. Security, business-case, pricing, Proof, and approval materials must preserve their verified qualifications and version history. **Human support:** Open Get Help with the intended outcome, expected and actual result, page, and safe reproduction steps. Never include secrets, payment data, or unnecessary sensitive files.