Example Contact Management SOP

1. **Objective:** To harmonize and improve the contact management process across sections and teams in the OCHA office, thereby ensuring an accurate production of contact lists as a service to the humanitarian community. This is done by:
   1. Using Humanitarian ID (H.ID) as a contact management tool
   2. Identifying key contact list groups and allocating appropriate focal points across sections and teams in the office
   3. Setting in place the flow and schedule of periodic update, monitoring and verification of contact lists
   4. Setting in place periodic training and promotional plan for the office and partners
   5. Setting in place H.ID utilities at the workplace (browser shortcuts to contact lists and H.ID mobile app)
2. The following key contact list groups are to be managed in collaboration between assigned focal points and the Information Management Unit (IMU)
   1. All OCHA staff based in-country or on mission (including ERR, SBP and ASP)
   2. The Resident / Humanitarian Coordinator (RC/HC)’s team
   3. All Cluster coordinators and co-leads / Cluster groups (ICC and IMWG)
   4. Humanitarian Country Team (HCT) members
   5. International NGO key contacts
   6. National NGO key contacts
   7. UN Country Team members
   8. Humanitarian Forum
   9. Donors
   10. The UN security focal points
3. The monitoring and update of key contact list are to be done twice a month. The flow and information update are done as follows:
   1. Focal points for each contact list are to maintain contact information on an excel spreadsheet with standard fields and pass them to the information management focal point every two weeks for verification and registration to H.ID. Each focal point must also highlight the individuals who are removed from the list to ensure that they will be checked out, retagged or removed from the relevant H.ID lists.
   2. The information management focal point will take an extract of the H.ID operation list and other relevant custom and roles/groups lists and compare them with the consolidated excel spreadsheet.
   3. The analysis and verification contact information would be done with an excel tool that is configured to identify duplicates and missing e-mail addresses.
   4. Missing contact information will be added to the H.ID Operation list by the IMU and relevant custom lists or roles/groups.
   5. In the case where a new contact information has been added and the person is not yet registered on H.ID, the IMU will create [a new user directly on H.ID](https://humanitarian.id/users/new). The system will then send a message to the user asking to claim the account. The IMU will perform the initial check-in to the operation and relevant lists as well as assigning relevant tags for organization, roles, groups and location.
   6. A periodic follow-up is to be done by the IMU to ensure that the newly created user(s) will claim the account so that it does not remain as an orphan account. The follow-up e-mail will highlight the advantages of claiming the account which include receiving regular humanitarian information products and accessing the humanitarian contact list.
   7. The IMU will also ensure that all key contacts on the managed list groups are added to the managed service for humanitarian information products via Humanitarian ID. This will ensure that all the key contacts would receive the regular newsletter/information products disseminated via MailChimp. In addition, the IMU will cross check the MailChimp distribution list against the H.ID contact list.
   8. (As x operation contact list is protected due to the security situation in the country, this means that only verified accounts can have access to viewing the contact list. Therefore, each individual account within the managed contact list groups must be made a verified account. Only claimed accounts can be made verified accounts.)
4. In setting the training and promotional activities in place for H.ID, the IMU will ensure provision of the following:
   1. Training of all incoming OCHA staff on how to use H.ID, including ad-hoc/on-demand training for current OCHA staff or focal points from various sections and teams.
   2. Periodic training open to all humanitarian workers on H.ID.
   3. Customized promotional materials using [materials available on the H.ID support website](https://about.humanitarian.id/humanitarian-id-promotional-materials/).
   4. Meeting attendance sheet to be generated from H.ID for every relevant meeting with humanitarian partners
   5. Mechanism that will require the requesting partners and agencies to be on H.ID for the map printing request to be treated
5. In setting the H.ID utilities in place for the OCHA Office, the IMU will ensure the following:
   1. Browser shortcuts to relevant H.ID contact lists are placed on all OCHA staff computers
   2. H.ID mobile app is installed on all OCHA smartphones
   3. Appropriate set up of favorite list on H.ID dashboard
6. Issues around H.ID platform and contact management in general are to be documented. Advice and technical support on H.ID platform can be obtained from to the H.ID team - [info@humanitarian.id](mailto:info@humanitarian.id)

Annex 1 – Contact Management Checklist

**Contact Management Checklist**

**Minimum requirements**

* All OCHA staff based in-country or on mission (including ERR, SBP and ASP)
* The Resident / Humanitarian Coordinator (RC/HC)
* All Cluster coordinators and co-leads
* All Humanitarian Country Team (HCT) members
* The UN security focal point

**Recommended requirements**

* All IM Network members
* All Cluster communications and media focal points
* All staff of the Office of the Resident Coordinator
* All major heads of agency

The following managed contact lists are recommended:

* Cluster coordination (cluster and inter-cluster coordinators)
* Humanitarian Country Team
* IM Network

**Recommended monitoring**

* Verify key contacts weekly
* Verify key mailing lists weekly
* Verify all agency staff every 3 months (on a rotating basis, i.e. checking a few agencies each week), ideally through a single focal point
* Contact all remaining orphan accounts monthly to encourage them to sign-up

**Good practice**

* Identify a focal point within each agency you can use to verify contacts
* Train all incoming OCHA staff on how to use Humanitarian ID
* Organize a monthly training open to all humanitarian workers on key IM products and services, including Humanitarian ID
* Add browser shortcuts to H.ID mailing lists on all OCHA staff computers