

Indigov *New Member Checklist*

120th Congress | New Member Orientation 2026



In the weeks between Election Day and January 3, your transition team will turn campaign operations into a functioning congressional office. The decisions you make now will shape how quickly your staff can listen, respond, and serve constituents from Day One.

Build the foundation



Build your team

Identify the roles your office needs in Washington and the district, including legislative, communications, casework, correspondence, operations, scheduling, and district staff. Establish responsibilities early and decide how DC and district teams will work together.



Choose your website

The House offers a free website service called WebAssist, which many freshman offices select as they get up and running. Review the House-provided option alongside approved website vendors and decide how constituents will find information, contact your office, sign up for updates, and stay connected with the Member.



Build your office budget

Develop an MRA budget around the Member's priorities, including staffing, technology, travel, district offices, and constituent engagement. Use current House and CAO guidance as you make spending and procurement decisions.



Plan your DC and district offices

Prepare for your assigned Washington office and determine where district staff will work to best serve constituents. Consider accessibility, security, equipment, furnishings, and the needs of staff and visitors.

Prepare to serve constituents

Establish your constituent service operation

Decide how your DC and district teams will manage correspondence, casework, outreach, and requests for assistance. Establish clear responsibilities and workflows for how constituent needs are received, assigned, escalated, approved, and resolved.

Plan your office technology with Indigov

Work with House resources to plan the hardware, phones, cybersecurity, software, and House-approved tools your teams will need. Select your constituent services CRM early so it is configured and ready by January 3. With Indigov, incoming constituent messages do not have to become hours of manual sorting. Indigov helps sort and organize correspondence, groups similar messages for batching, and keeps emails, phone calls, office visits, casework, and constituent history connected in one place. We can also bring inherited constituent data into your new Indigov CRM so your team starts with the history it needs to serve the district.

Get your staff ready on Indigov

Indigov provides onboarding and training for your DC and district staff before you take office. We work with your team to configure workflows and train staff on how Indigov sorts, organizes, and batches constituent correspondence, manages casework, and captures constituent interactions so they are ready to use the platform from Day One.

Start serving constituents on Day One

Constituent service is how many Americans experience their government. A constituent reaching out for help does not see systems or software; they see their Member of Congress and the office representing them.

Indigov is the fastest-growing constituent services CRM on Capitol Hill, used by more than 100 House offices. Built around congressional operations, Indigov takes on the repetitive work behind constituent service by helping sort and organize incoming correspondence, group similar messages for batching, and keep constituent interactions connected. That means staff can spend less time manually organizing requests and more time listening, responding, and helping constituents.

With Indigov, incoming offices can:

- Automate and organize incoming constituent correspondence.
- Keep emails, phone calls, office visits, casework, and constituent history connected in one place.
- Give DC and district staff a shared view of constituent interactions.
- Bring inherited constituent data into the new CRM and get staff up and running with training and a dedicated Customer Success Manager.

Schedule an Indigov demo during New Member Orientation and see how your office can be ready to listen, respond, and serve from Day One.

