

## TIPS FOR TALKING WITH DECISION MAKERS: IN PERSON, VIRTUALLY, AND OVER THE PHONE

An in-person meeting, a virtual meeting, or a phone call with decision makers are great opportunities to influence them on an issue you care about. We've provided some tips for the meeting itself, how to prepare ahead of time, and what to do afterward to effectively follow up.

### Preparing for Your Meeting

- Make your meeting request by email and by phone.
  - Suggest specific times and dates.
  - Let them know what issue or piece of legislation (by bill number, if it has one) you want to discuss.
  - If you are a constituent of the elected official, or if your group includes constituents, make sure the official knows that when you schedule your meeting.
  - Decide who will be a part of your meeting.
  - Decide if you will hold the meeting alone or with allies.
  - Consider including people who represent the constituencies that are affected by the issue you are discussing.
  - Keep your group small. More than four to five people in one meeting can become unmanageable.
- Do your research
  - Take the time to learn about the person you're meeting with and if they've taken a position on your issue or similar issues in the past.
  - Study up on the views and arguments on both sides of your issue.
  - Use data, news stories, and other examples to support your position.



- Develop talking points
  - Draft three to five clear and concise points you'd like to make throughout the meeting, and refer back to them throughout.
  - If the meeting gets off track, use your talking points to steer the conversation back to your issue.
- Make a clear ask
  - Clearly define your goal for the meeting and make your objective explicit. For example, are you asking a legislator to vote for or against a bill? Sign a pledge? Plan and practice for your meeting.
  - Whether it's just you or a group, it is a good idea to practice your talking points.
  - Have a clear idea of the points you want to make and in what order.
  - When meeting as a group, identify roles and responsibilities for each participant. Who will say what?
- Bring or offer additional materials
  - Be prepared with reference materials such as fact sheets, news articles, or relevant research.
  - If your meeting is happening over the phone or virtually, offer to send the materials via email or mail.

### **During Your Meeting**

- Be prompt and efficient: Legislative offices generally have packed, tight schedules. Be on time and stay on message.
- Make it personal: Introduce yourself, and bring up any relevant personal, professional, or political connections or expertise you have.
- Take the time to prepare a brief introduction of who you are, why you're meeting with the decision maker, and what you'd like to speak about.
  - Example intro: Hi, my name is [your name] and I'm calling from [your location or affiliation] to talk to [decision maker] about potential solutions to plastic pollution in [your city/state/watershed]. Can you connect me with [decision maker] or someone else in your office who would be willing to speak with me about this issue?
- Meeting with staff: In some instances, you will be meeting with staff instead of meeting directly with the decision maker. Staff play a critical role in conveying information to decision makers. Meeting with staff in lieu of the decision maker is still a valuable opportunity, and you should treat staff the same way you would a decision maker.

- **Unexpected questions:** If you don't know the answer to a question, never make one up. Make a note of it and tell them you will look into it and get back to them. And then make sure to follow up with the answer. Try to get a commitment: Try to get a commitment to support your request. Ask questions and wait for the answers. Listen carefully. When in doubt, ask for clarification.
- **Share your visit:** If visiting with a decision maker in person, ask to take pictures with them. If allowed, you can share the pictures on social media. Feel free to share photos with us on social media or by sending to [alliance@greatlakes.org](mailto:alliance@greatlakes.org)—we'd love to see you in action!
- **Say thank you:** Thank the decision maker for their time and for any work the decision maker is doing on the issue.

### **After the Meeting**

- Review your notes.
- Right after the meeting, review your notes and compare notes with others if you attended as a group.
- Get clear on your understanding of what was agreed upon in the meeting. Say thank you again.
- Send a personal thank-you letter to the person you met with, including a reminder of anything he or she may have agreed to do.
- Follow up with more information.
- If there were questions you were unable to answer, or if additional materials were requested, follow up on those tasks in a timely fashion.

