CALIFORNIA TOBACCO ENDGAME CENTER FOR ORGANIZING AND ENGAGEMENT
A project of the American Heart Association

TIPS FOR HAVING AN EFFECTIVE LEGISLATIVE VISIT

In this document, we will outline the steps to have an impactful, efficient, and respectful meeting. You do not need to be an expert on the issue, just to be comfortable with the basic speaking points. However, you ARE an expert on your own experience, your story, and why you care. Your "why" will mean more to the decision maker than dry statistics.

The flow of an effective meeting can be described in three parts: The Hook, the Line, and the Sinker.

- **THE HOOK:** This is a basic introduction of who you are, what organization you represent, and if you are constituent of this decision maker.
- **THE LINE:** This is your personal story, your experience related to the issue, your why.
- **THE SINKER:** This is the specific ASK for the meeting.

BEFORE THE MEETING

Do your research. You will want to know a bit about the decision maker that you are meeting with in advance of the meeting. Look them up on the jurisdiction's website, Wikipedia, YouTube, Facebook, Twitter, and/or in the local news media. You may get a sense of their stand on similar issues, or that you have a personal connection with them, having attended the same school or an interest in the same sport.

Please familiarize yourself with the speaking points and the issues that will be discussed. Also, you will want to write out and rehearse your LINE, which is the reason that you care. It should not be more than 30 seconds long.

Your team will schedule a planning session a couple of weeks before the event so you can get to know each other and assign roles. Each person should practice delivering their Hook, their Line, and the Sinker during your planning session. It is one thing to write your story down, it is another to say it out loud in front of others! The team should be able to deliver their entire presentation in approximately 10 minutes.

DURING THE MEETING

Since this meeting will be virtual, be sure to log on about ten minutes early to ensure that your camera, speaker, and microphone are all working well.

You may find out (in advance or at the time of the meeting) that you are meeting with the staff rather than the decision maker. Meeting with a staffer is not a cause for concern, you will still have an impactful meeting. Don't underestimate a staff member. Staffers have the ear of the decision maker and is often able to give you more time and listen to your issue with less distraction than the decision maker themself.

If you meet with the decision maker, there is no need to be nervous. They are a person, just like you, and they actually care about what you think. In fact, they work for you!

Now, remember the three parts of an effective meeting.

THE HOOK: A constituent should thank the decision maker for meeting with you. Everyone should briefly introduce themselves and be sure to point out if they are a constituent of this decision maker. If they are not a constituent, they do not need to mention it unless asked. At this time, there is also a brief mention, just one or two sentences, about why you are there today. This is a brief preview of the Sinker, and the Ask.

THE LINE: Unless the meeting is too large, everyone will want to briefly share their why. Your why can be your personal story, or local examples of the impact of the issue on the community.

THE SINKER: The Sinker is the reason you are there, what you want from the decision maker, the Ask. Always finish with the Ask. One constituent should deliver the Sinker and make the Ask. Then, stop talking and let the decision maker respond.

Be sure to stay on message. You may care about a variety of issues in the community, and decision makers often try to distract you, especially if they are not in alignment with your Ask. But remember that you are there for just one purpose.

It is fine if the decision maker or their staff cannot commit to your Ask in the moment. Sometimes they want to do more research before making a decision. If they ask you questions that you do not know the answer to, it is all right to tell them that you do not have the answer, but that you will get it for them. In fact, that is ideal because it give you a chance to follow up with them and show that you can be a resource for them on this topic.

Everyone should thank the decision maker before leaving.

The entire meeting should not last more than 15 minutes, so be prepared to end your remarks in about ten minutes so that the decision maker has time to share their response or ask questions.

AFTER THE MEETING

Briefly meet with your group after the meeting to compare impressions and to identify what follow up work is needed and who will do it.

Whether the decision maker requires follow up work or not, send a thank you note to each person that you met with, decision maker and staff alike.

Those notes help you form long term relationships with the offices. The decision maker may not stay in office, but their staff is likely to work for another decision maker in the future, or run for office themselves, and you want them to have a positive impression of the organizations that work on our issues.