

# Advocating in Person

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# Preparing For The Meeting

- Develop your key messages (i.e. what you want to say) about the issue of concern to you
- Decide what your one 'ask' will be (i.e. what are you going to ask this decision-maker to do for you)
- Determine who will be attending the meeting with you
- Write out the version of your personal story that you want to deliver
- Request the meeting



# Getting the Meeting

- 'No' is not an option
- Make an initial telephone call
- Have a letter prepared to e-mail that briefly outlines why you want to meet with that person
- After the letter goes, follow-up repeatedly until you get the meeting
- You may be offered a meeting with someone else – you should generally take these opportunities, but continue to pursue the person you need to see



# Before The Meeting

- Provide any material that you want the decision-maker to read ahead of time (keep it brief)
- Advise whom you will be bringing, and ask for information on who will be attending for them
- If possible, gather knowledge about the participants
- Know how long the meeting is scheduled for
- Contact the person you are meeting with just prior to confirm...and be on time



# Who Should Attend

- Generally 3-4 people at the most
- Everyone who attends needs to have a role to play
- Purpose is to paint a complete picture of the issue for the decision-maker, from several perspectives
- One combination – organization, content expert, individual impacted
- Make sure someone takes notes and observes the dynamics in the room



# At The Meeting

## *Good news...*

- You've got your 3 messages, you've got the right combination of people in front of the decision-maker you need to see and you're prepared

## *Bad news...*

- **You've got 1 minute...**who are you, who you represent, why are you there, what do you need this decision-maker to do for you (and how), what can you offer in return



# Presentations

- If you use PowerPoint, make it brief (10-12 slides)
- Build it around your 3 messages and repeat those key messages throughout
- If you don't use PowerPoint, consider bringing a one-pager with the highlights so that everyone can follow along and you have a leave-behind
- Remember – technology can fail!



# Presentations

- Conclude with your ask and how you propose it be done (come with solutions)
- Check at the beginning of the meeting how long the decision-maker has and adjust your presentation accordingly (leaving enough time for discussion)
- Have someone assigned to watch the time
- Don't go off, or get pulled off, on a tangent





# In The Meeting

- Let the decision-maker with whom you are meeting, speak
- If you are unclear about something, ask for clarification
- Be patient – your 3 messages are three of many that decision-maker will hear that day
- Establish clear follow-ups, with timelines



# Sample Agenda

- Introductions and delivery of key messages/'ask' – usually by attendee from the organization (5 minutes)
- Content expert (5 minutes)
- Organization (5 minutes)
- Individual impacted (5 minutes)
- Discussion (10 minutes)



# After The Meeting

- Provide any further information that may have been requested right away
- Call, write, e-mail or text to thank the decision-maker for meeting with you
- Follow-up shortly thereafter to track progress and advise of what you are doing to move your 3 messages forward



# Advocating in Person

## *What **NOT** to do...*

- Threaten
- Make an appointment to go and talk to someone in government when you only have an idea, but no context or message
- Meet with a decision-maker when you have no clue why you are doing so ie. you have no ask
- Make a technical presentation to a policy-influencer who has no background in the area



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