

NationalJournalLeadershipCouncil



Charting New Channels of Influence

Strengthening Our Role in Policy Decision-Making

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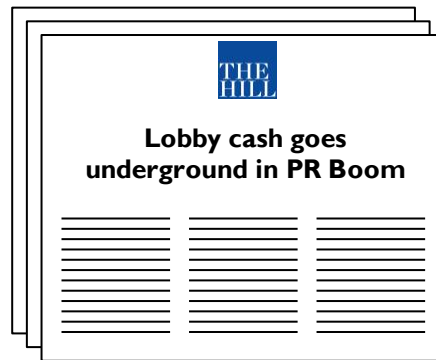
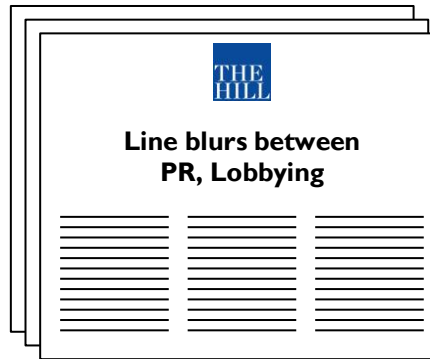
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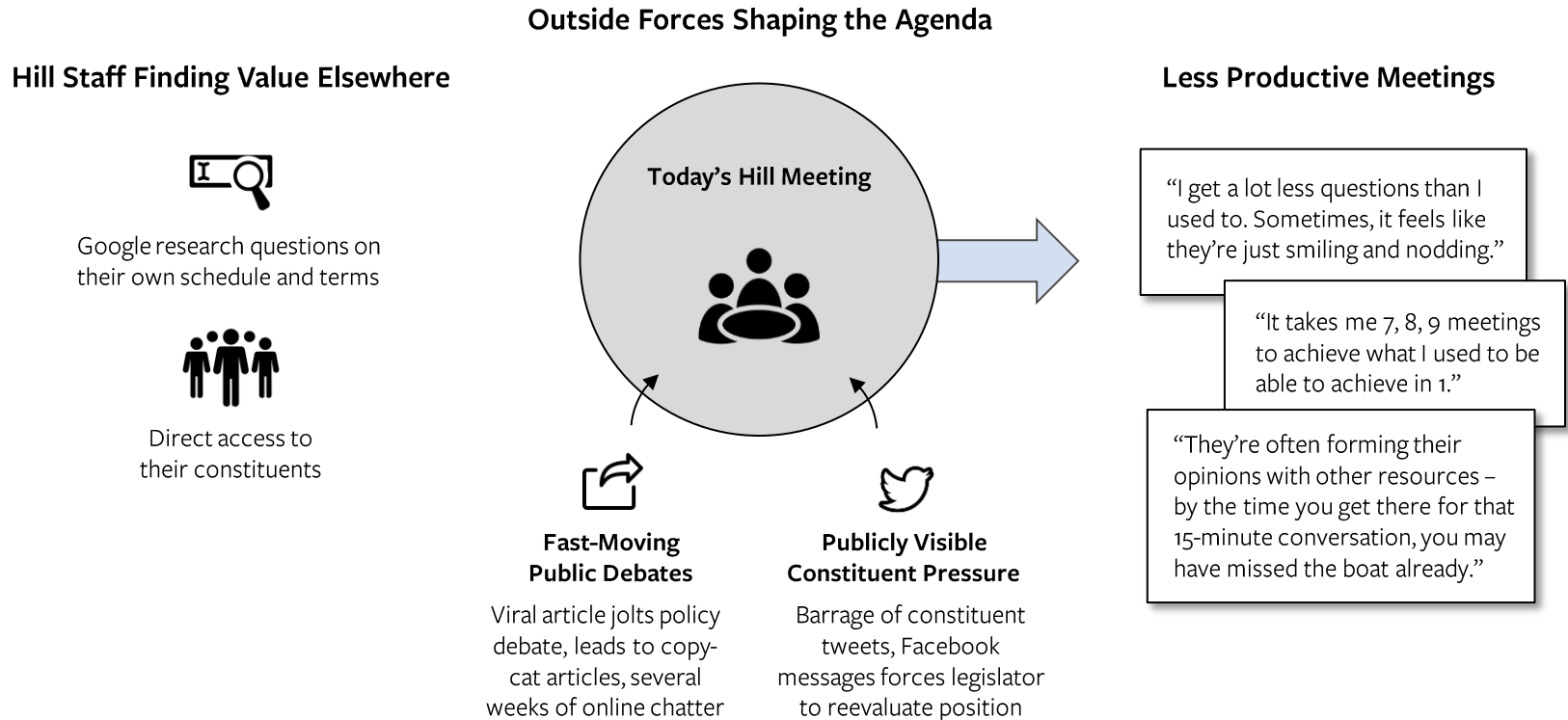
Changing Path to Influence in Washington

Recent Headlines About the Influence Industry's Evolution



Diminishing Returns from Face-to-Face Meetings

Members Report Outside Forces Creating Friction in Policy Process



Policymakers Increasingly Ask Us to Help Shape Environment

Hill Offices Much More Explicit About What they Need From Us

Taking Orders

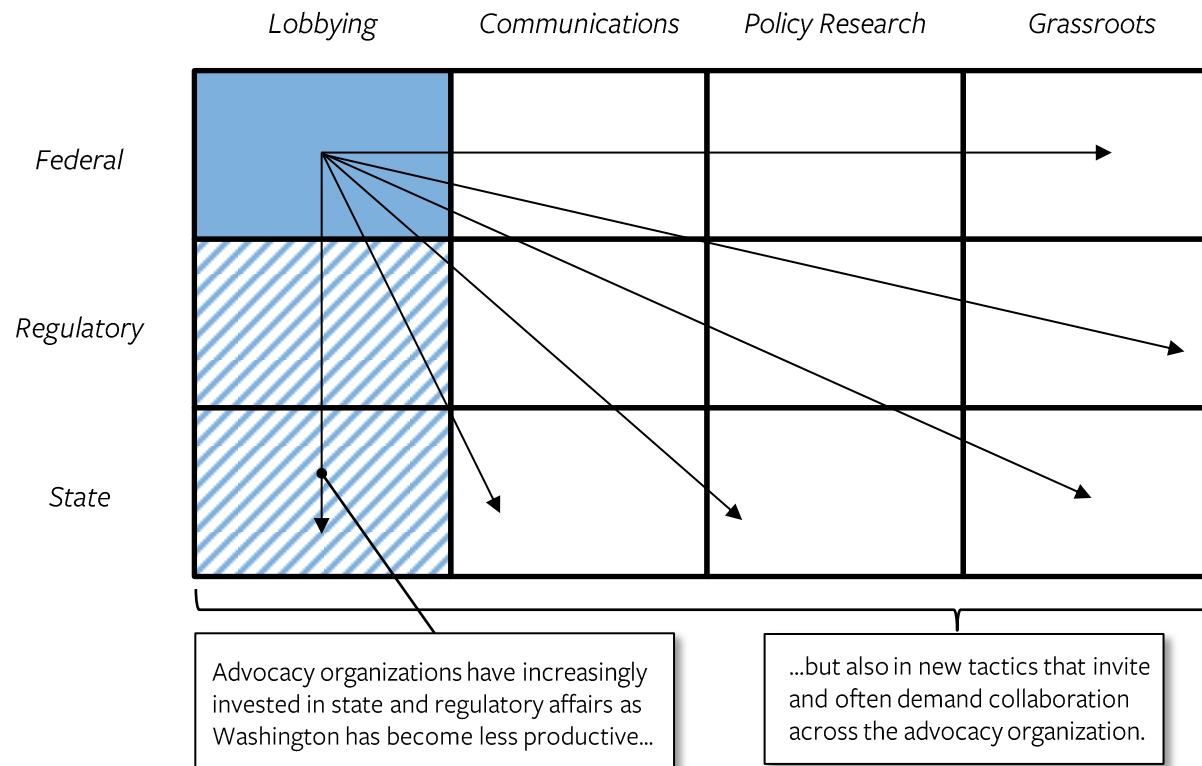
“One of the big changes we’ve seen over the last few years is how our meetings with policymakers unfold. Hill offices are much more explicit about what they need from us, whether that be mobilizing a few hundred advocates or getting a favorable op-ed or two placed in the local newspaper. There was a time when we could actually get things done in the first meeting. Sometimes it feels like we are waiters taking down their order.”

Vice President, Public Policy
Fortune 25 Corporation

Members Exploring Alternative Channels

Attention Flowing to New Jurisdictions, Tactics

Advocacy Organizations Share of Attention (and Resources)



Changes Afoot in Washington

What we are hearing...

Growing Value Outside Meetings

“We’ve learned that the work we are doing outside of our Hill meetings is having a far greater impact than the 30 minutes we spend in a Hill meeting.”

VP of Government Affairs
Fortune 100 Corporation

Entering Public Debates

“We’re forcing ourselves to wade into the cacophony. It is messy, but that is where decisions are getting made and we need to learn how to navigate it.”

SVP of Government Affairs
Trade Association

Redistributing Labor Investments

“We will continue to recalibrate our resources. I wouldn’t be surprised if we dropped one lobbyist and added one communicator each year through 2020.”

General Counsel
Fortune 25 Corporation

What we are seeing...

Infographics for the Win

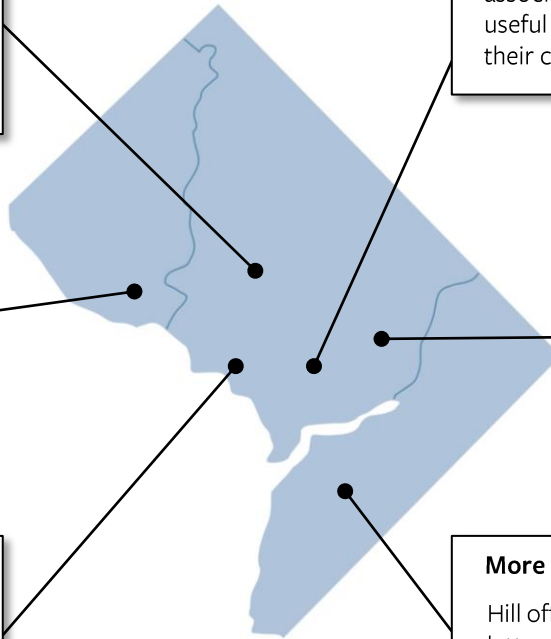
Member of Congress singles out an association’s infographic as the most useful piece of testimony shared with their committee.

Hill-Tailored Targeting Opportunities

Video ads targeted to mobile devices that have spent more than 8 hours on the Hill in a 7 day period and then log in to the internet at National Airport.

More Responsive to Public Messages

Hill office ignores hundreds of form letters sent via email but calls lobbyist the morning after receiving 12 tweets directed at the Member of Congress.



Experiencing Mixed Results to Date

Losing Faith from Early Experiments

Still Sitting on the Sidelines

Resource
Limitations

No Functional
Expertise

No Partners
to Engage

Disappointed by Early Efforts

Professional Video Flop



Association spends over \$100k on a series of three minute advocacy videos with less than 1000 views to date

Forgettable Panel Event



Corporation hosts panel discussion with several policymakers that is forgotten by attendees within weeks

Overlooked Microsite



Corporation builds advocacy microsite to share constituent stories that draws little interest from target audience

Sleepy Facebook Page

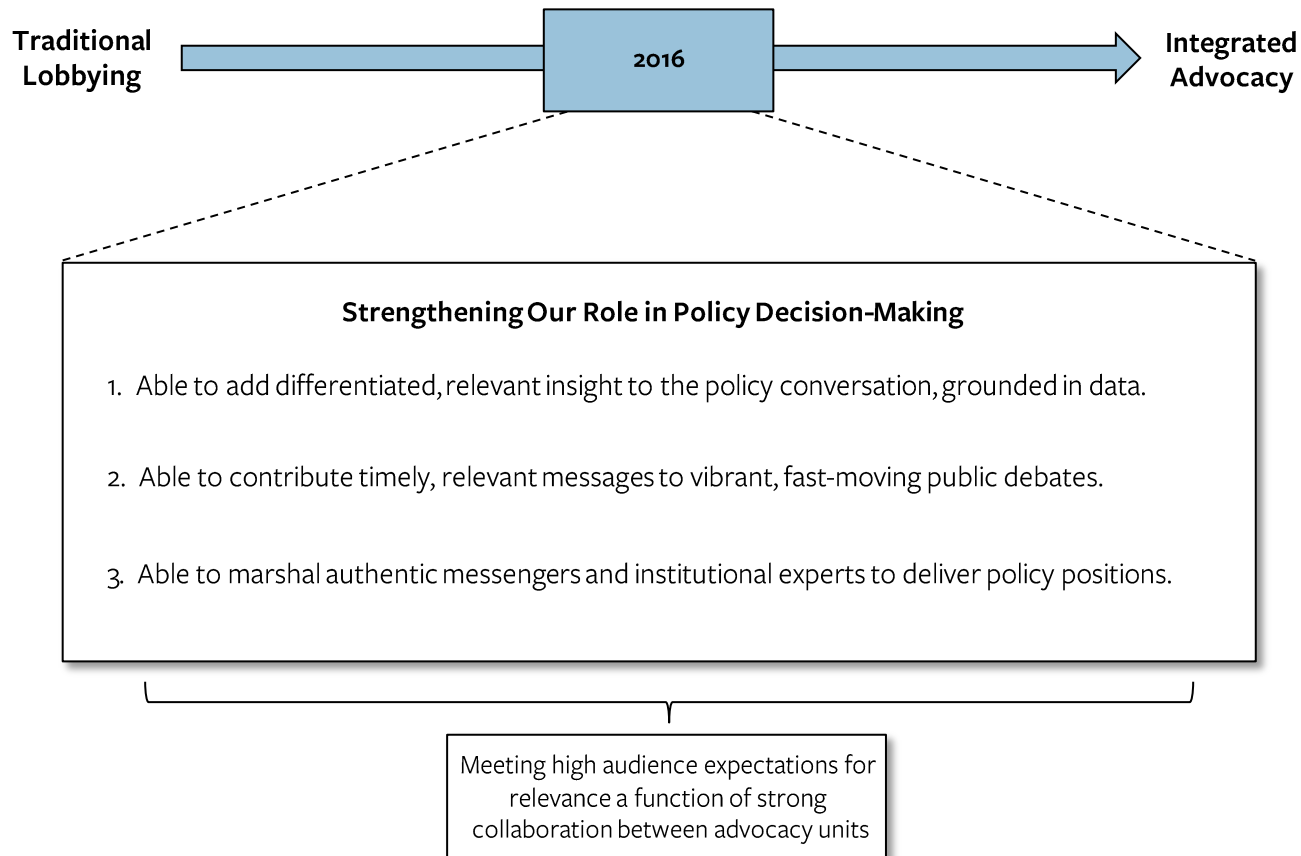


Association Facebook page attracts thousands of likes but majority of messages are ignored, lack comments

Pinpointing Today's Challenge

Making Our Contributions Relevant

Emerging Expectations for Government Affairs Offices in 2016



Charting New Channels of Influence

I

Earning a Role in Policy Decision-Making

Sharing Relevant Policy Content

- 1) Branded Content



- 2) Audience-Centric Event



- 3) Thought Leadership Curator



- 4) Inbound Marketing

Enlisting Authentic Messengers

- 5) Ambassadors' Hub



- 6) Advocate Special Forces



- 7) Twitter Cards



II

Organizing for Collaborative Advocacy

- 8) Integrated Advocacy



- 9) Purpose Statement



- 10) Expert Network



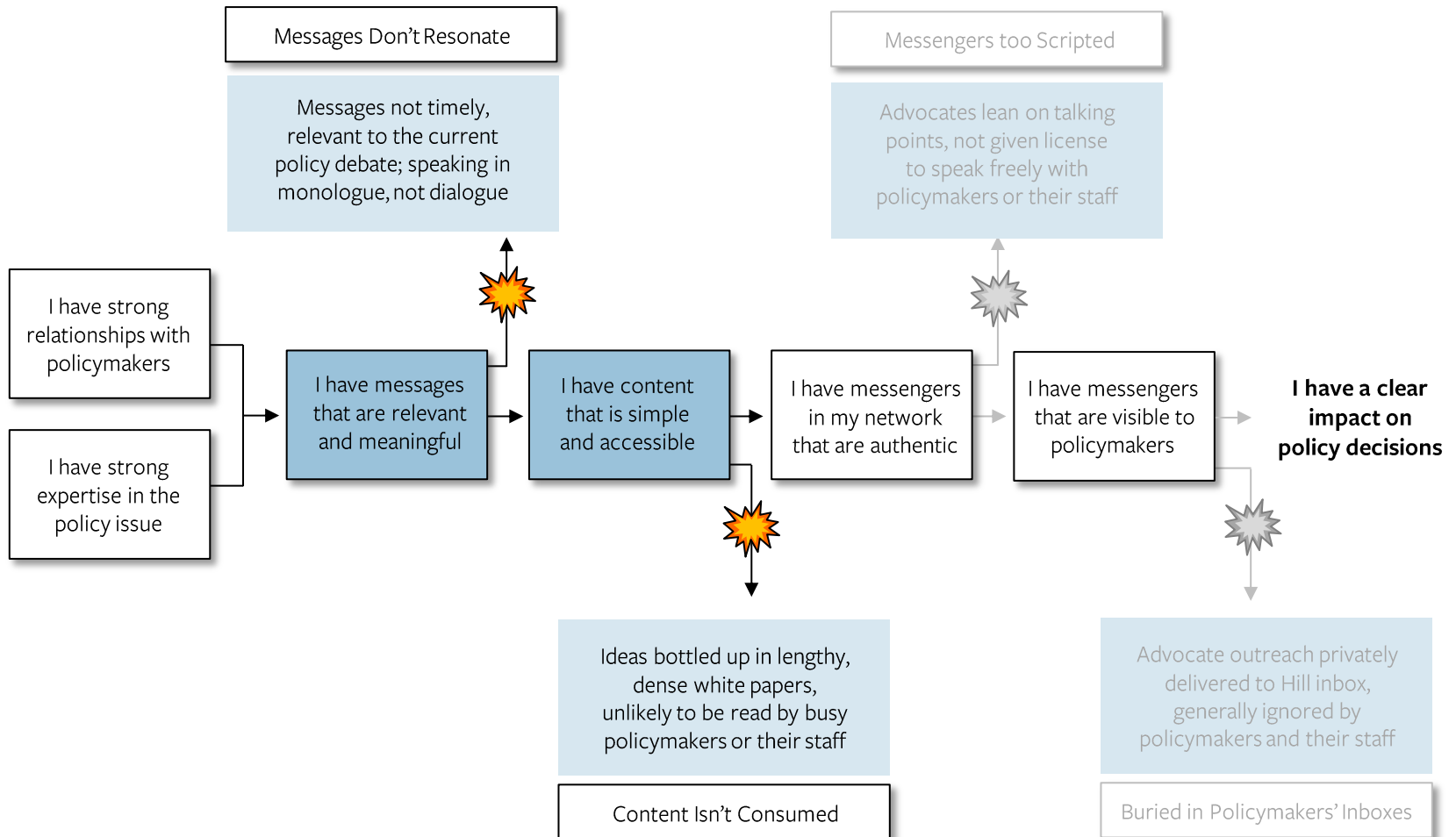
Earning a Role in Policy Decision-Making



NationalJournalLeadershipCouncil

Sharing Relevant Content

Obstacles on the Path to Impacting Policy Decisions



Positioning Expertise for Relevance Outside the Hill Meeting

Content Sharpening, Delivery Process

Generates Unique, Relevant Insights



- Issue terrain surveyed for opportunities to contribute to research conversation
- Target audiences interviewed to identify questions and needs that research can potentially answer

Ensures Research Will Be Useful to End-Users



Feedback shared with in-house experts who create custom research reports to answer questions in active conversations

Delivers Insights Where Target Audiences Are



Accessing organization's expertise made easy for target end-users

Key Partners

Economic Research team, Data PR

Policymakers, other influencers

Email Marketing, PR, Events

Case in Brief



Profiled Organization: Zillow

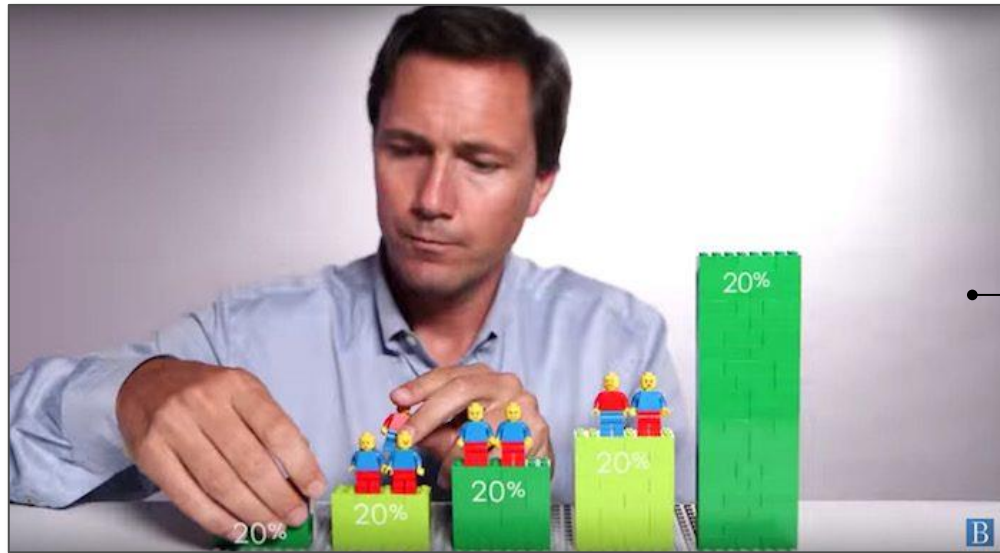
Organization Type: Corporation

- Organization seeks to reinvigorate and enter housing policy conversations on the Hill after end of housing crisis slows pace of conversation
- Director of Government Relations earns organization a role in conversations by positioning internal expertise to be useful to the specific questions and needs of policymakers and other active participants in housing and economic policy conversations
- Custom research produced for target audiences by company economic research team primarily through analysis of Zillow's and publicly available data

Reformatting Ideas to Shape Public Debates

White Papers Supplemented with Accessible Digital Content

Senior Fellow Richard V. Reeves Explains
Economic Mobility with Legos on YouTube



What's Different

- Seeks the attention of a broader audience than policy works
- Respects the shorter, itinerant attention spans of modern audiences
- Presents big ideas in simpler, more concrete formats without dumbing them down

BROOKINGS

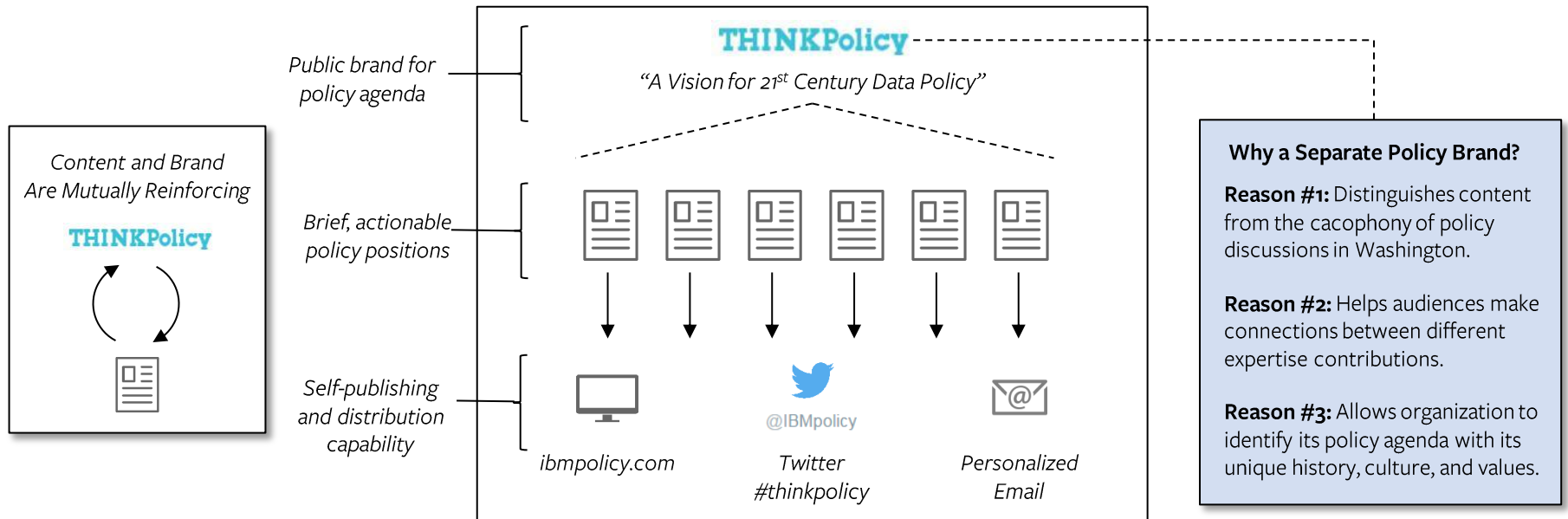
Profiled Organization: Brookings Institution
Organization Type: Think Tank

- Brookings Creative Lab launched in 2015 to reach broader audiences with organization's expertise
- Experts and Lab team collaborate to translate expertise into more accessible formats while maintaining the integrity of scholarly work; team produces 20 original pieces of content per week in the form of Twitter graphics, videos, podcasts, and articles

Publicizing the Organization's Policy Agenda

Wrapping the Organization's Policy Vision in a Distinctive Brand

Public Distribution of Expertise



Case in Brief



Profiled Organization: IBM

Organization Type: Corporation

- Organization creates separate brand to market new policy agenda and participates in public conversations by publishing specific, actionable policy content that upholds the brand's integrity and values.
- Organization uses new public voice to invite policy conversations in public and private spaces, online and offline, and to measure effectiveness.
- Self-publishing and distribution mechanisms allow organization to control its own voice and set its own priorities.

Applying Content Standards

Distinguishing THINKPolicy from Other Content Types

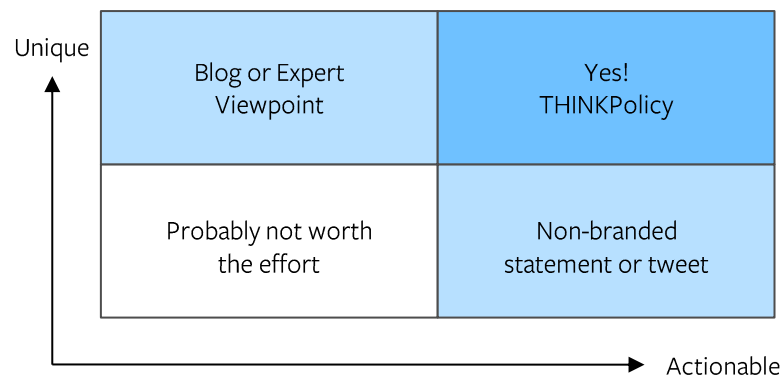
Content Standards

Questions for Identifying “Branded Agenda” Content

		YES	NO
<i>Timely</i>	Does this topic have a strong chance to make it onto the agenda in the next 24 months, or is there currently any urgency for action to be taken?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>Unique</i>	Are we sharing a unique or differentiated position or recommendation that has not been shared by any of the main players in the debate?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>Actionable</i>	Do we have concrete recommendations for how policymakers should address the policy matter at hand?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

If “No” to any of the above questions, it is not a THINKPolicy piece

Does the content make the cut?



Smaller Events Serve Targeted Audiences

National Policy Research Customized with More Specific Cuts for Attendees

Zillow Policy Research Event in Detroit

May, 2015

Event Agenda

Mortgage Lending in the Detroit Housing Market

8:00 am Registration and Breakfast

8:30 am Opening Remarks, Zillow Chief Economist

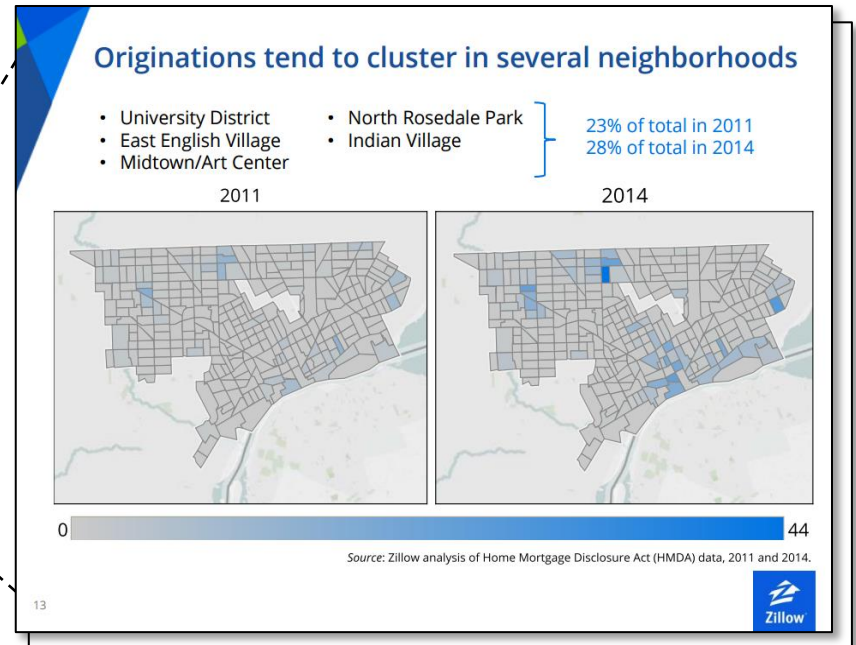
8:35 am Panel One: How Detroit's Urban Revitalization is Re-Igniting a Region

9:15 am Panel Two: Detroit's Mortgage Market: Challenges & Innovations

10:15 am Open discussion with audience

10:45 am Adjourn

Custom Research in Presentation



Case in Brief



Profiled Organization: Zillow

Organization Type: Corporation

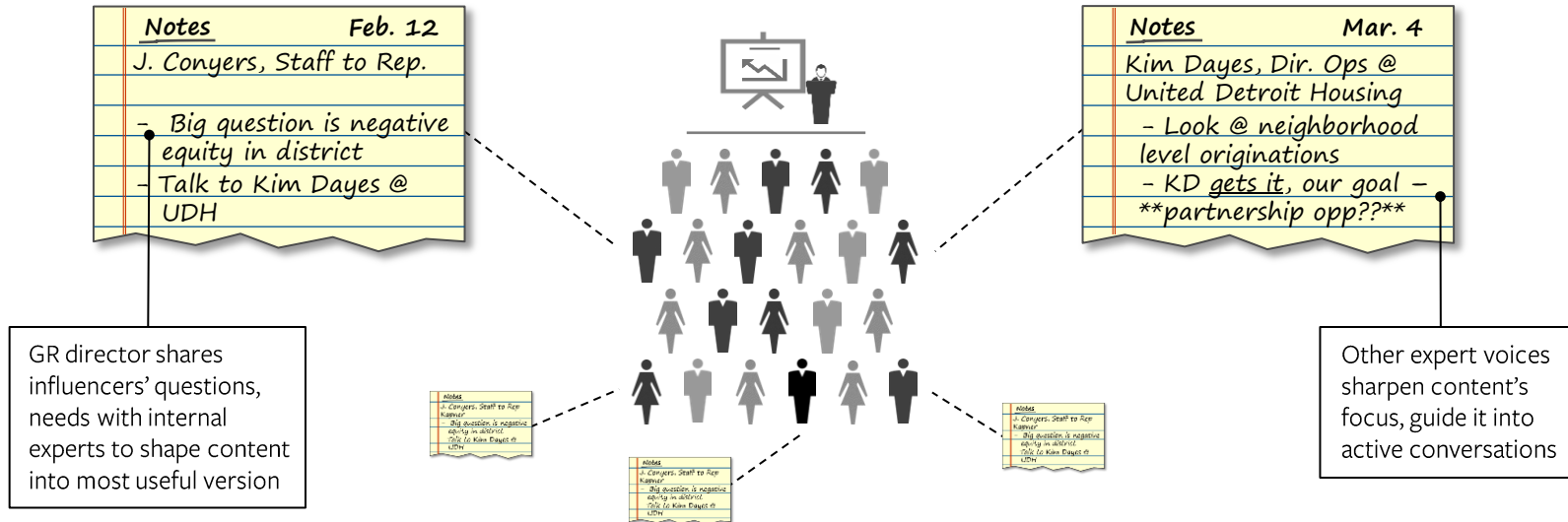
- Organization hosts events in select cities to share research content highly customized to the specific questions of target influencer invitees
- GR director learns needs of influencers in conversations and plans event content in collaboration with research director; public affairs team coordinates events, inviting policymakers, their staff, local organization leaders, academics, and other influencers

Understanding Desired Attendees' Individual Needs

Interviews with Target Attendees Reveal Essential Research Questions

“Housing Roadmap” Event in Detroit¹

May, 2015



Event Planning Adjustments

Extended Planning Timeline



4-month planning period required to customize research and incorporate organization's, partners' perspectives

Close Collaboration with Internal Experts



GR Director meets with Chief Economist weekly to reconcile audience research with internal expertise capabilities

Partnerships with Credible Issue Voices



Partners selected for their credibility in community on topic, alignment on achieving research goals

¹ All names and the contents of notes are illustrative.

Raising the Profile of Policy Experts

Director of Thought Leadership Makes Organization's Expertise Accessible Through Individuals

Select Responsibilities



Catalogs Organization's Experts

<i>Expertise Audit¹</i>			
Speakers		Writers	
<i>Expert</i>	<i>Topic</i>	<i>Expert</i>	<i>Topic</i>
L. Smith	Immigration	D. O'Malley	Trade
B. Miller	Privacy	L. Smith	Immigration

- Determines for which issues organization wants their expertise to be recognized
- Interviews experts to identify strengths and to gauge interest in representing organization

Identifies Best Speaking and Writing Opportunities

<i>Opportunity Evaluation</i>
<ol style="list-style-type: none"> 1. What audience finds this policy message relevant? 2. How much control do we want over the message? 3. What platform will help this policy message spread? 4. Who else will be in attendance, participating? (events)

- Creates wish-list of events, publications in which experts would be placed
- Selects best forums based on audience relevance, potential for message to spread

Guards Organization's Message

<i>Risk Assessment</i>	Yes	No
1. Do we have an original angle or policy perspective to share on the topic?	___	___
2. Is our message consistent with what our lobbying team is saying to policymakers?	___	___

- Previews themes of upcoming writing and speaking engagements with GA staff
- Balances need to offer fresh perspective with need for consistent policy positions

Case in Brief

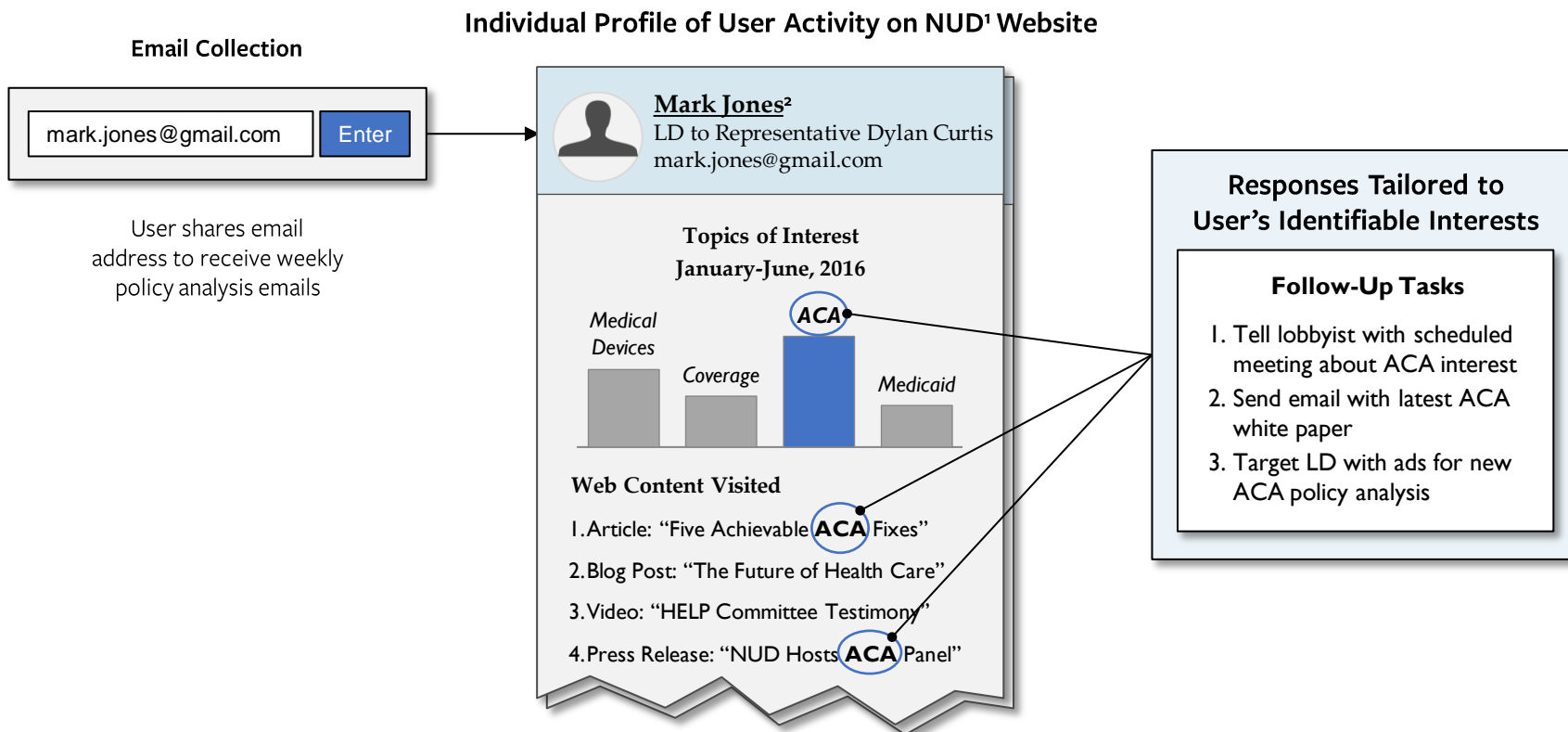


Profiled Organizations: Consumer Technology Association
Organization Type: Association

- Organization cultivates the public intellectual profiles of its top experts, facilitating their placement on relevant industry panels and broadcast opportunities, and their writing in publications read by target policymakers and industry and policy influencers
- Director of Thought Leadership coordinates both logistics and messaging, specifically circulating key themes with all internal stakeholders to ensure that their message is fresh, differentiated, and consistent with past statements
- Director of Thought Leadership manages content production, promotes placements via social media among key influencers

Personalizing Engagement of Top Targets

Users' Online Activity Informs Next Advocacy Touchpoints



Case in Brief



Profiled Organizations: National Union of Dogwalkers¹

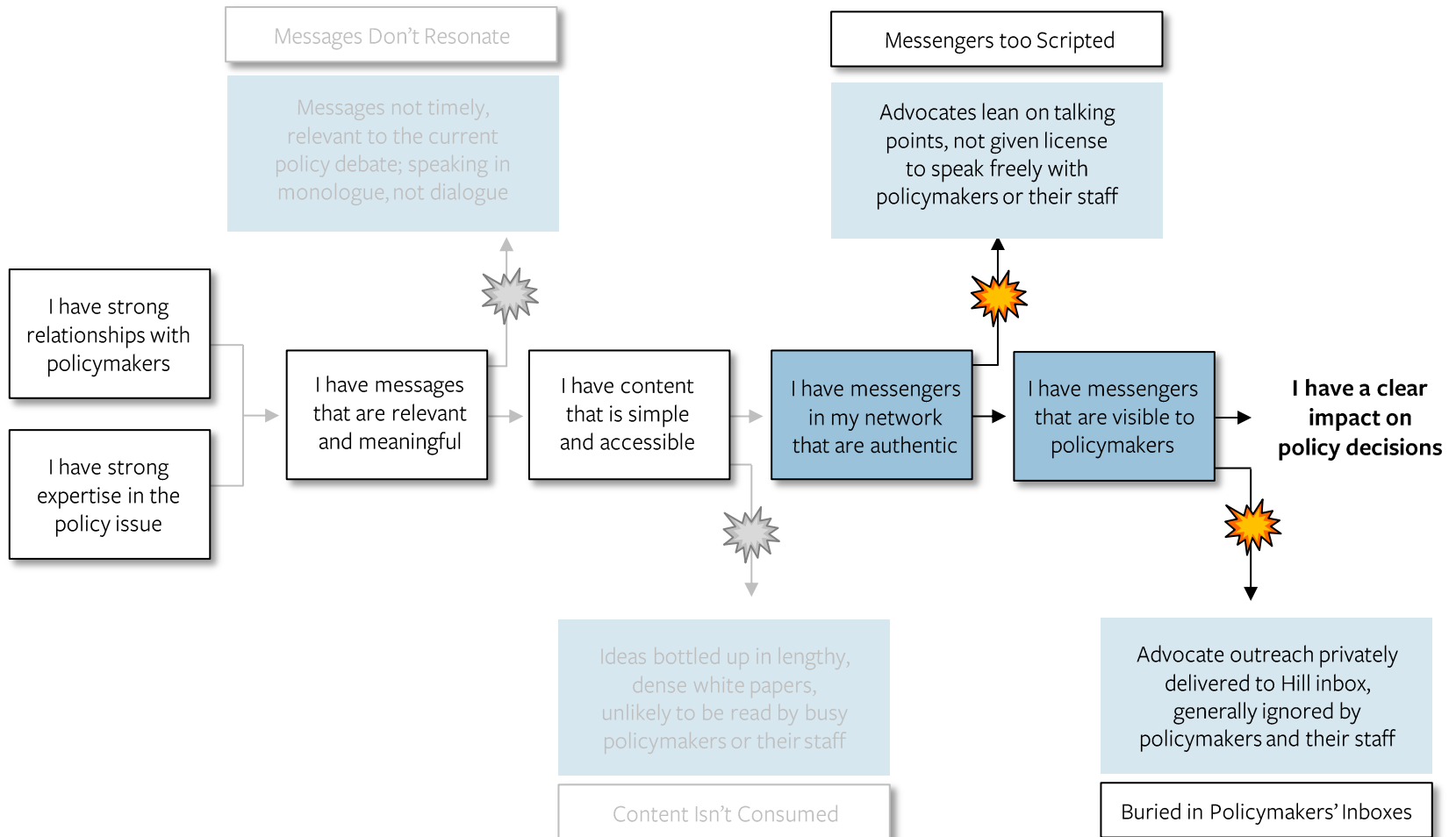
Organization Type: Association

- Organization collects data of visits to organization's website at the individual level, uses individuals' data to tailor future offline, online interactions to each person's identifiable interests
- Targeted data collection enabled in inbound marketing software when user shares email address for weekly email series

¹ Pseudonym.
² Illustrative.

Enlisting Authentic Messengers

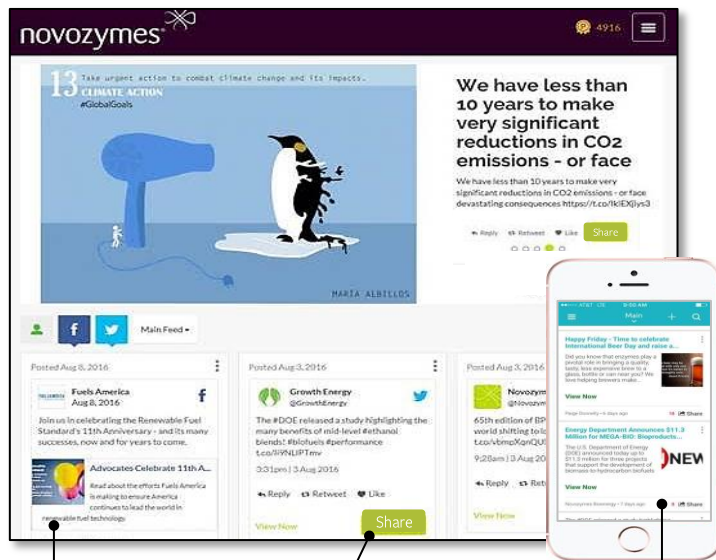
Obstacles on the Path to Impacting Policy Decisions



Borrowing Advocates' Digital Voices

Online Hub Arms Employee Ambassadors to Share Engaging Policy Content

Novozymes Advocacy Content Hub Website



~60% of hub content curated from external websites

Shares content via ambassadors' personal social network accounts

Simple user experience eases burden of taking action

Ambassador Uses of Online Hub

Learn Policy



Share Information with Peers



Connect with Fellow Ambassadors



Sign up for Offline Engagements



Minimum Expectations for Ambassadors

- Post content from the hub to social media network a minimum of 2 times per month
- Participate in minimum of 1 offline advocacy event per calendar year

Case in Brief



Profiled Organization: Novozymes
Organization Type: Corporation

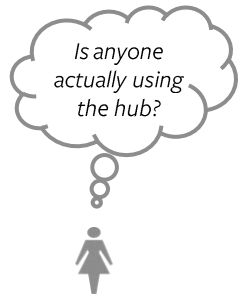
- Organization sets up an online content hub for a trusted group of highly engaged employee ambassadors
- Hub updates daily with opportunities for offline action and social-friendly content for ambassadors to read and share with their personal and professional online networks; ambassadors connect hub directly to their personal social media accounts
- Hub software Voicestorm offered by Dynamic Signal at cost of \$10 per user monthly

Ensuring Participation

Elevating Visibility of Peer Contributions Drives Momentum

Actions Taken to Improve Visibility of Hub Community Activity

What your advocates are wondering...



Most Dedicated Candidates Enlisted First

25 most dedicated advocates recruited at hub launch to build community momentum

Friendly Competition Encouraged

Points for Activities

Scoring System

1. Share a post on social media 5
2. Share video on social media 20
3. Click on content you shared 1
4. Submit a post to the hub 5

Ambassadors earn points for each action taken within the hub and for offline advocacy

Scorekeeping

Member Leaderboard		
Since Jul 3, 2016		
#	Member	Points
15	You	849
1	Julia G.	6444
2	Jim B.	6258

Ambassadors see where they stack up relative to others in community on points leaderboard

Hub Content Refreshed Regularly

Advocacy manager adds new content daily to facilitate fresh experience every day

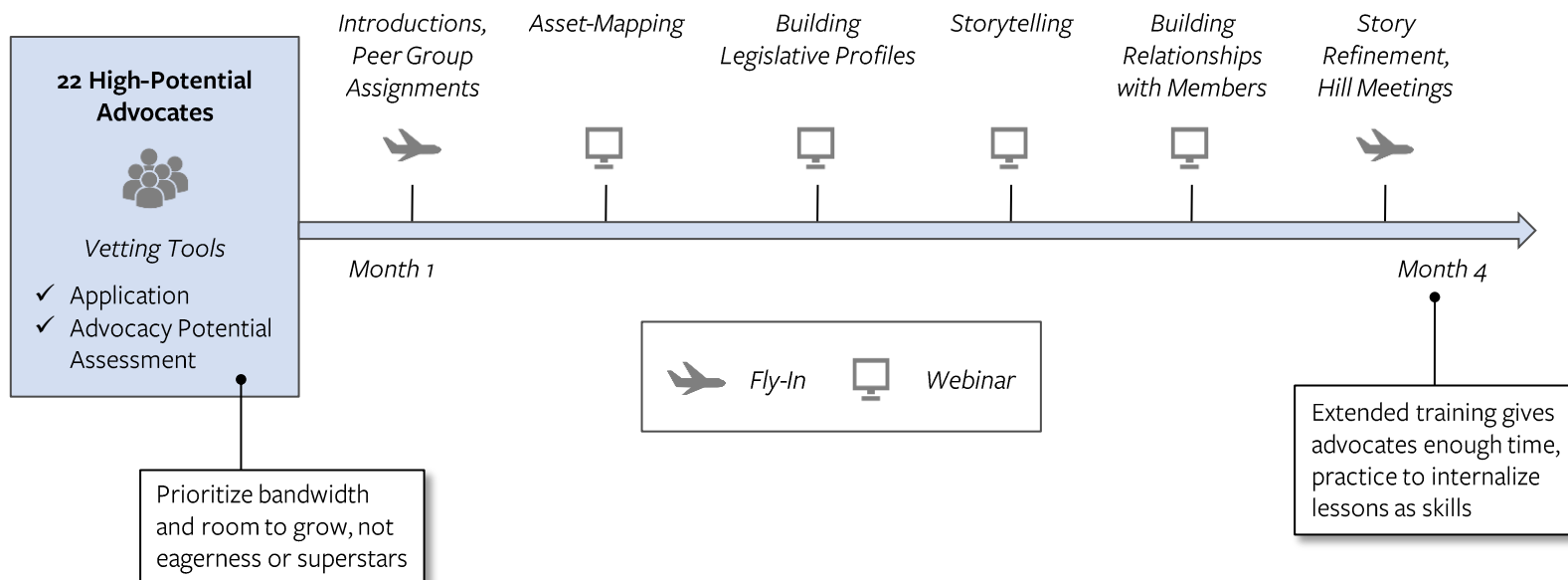
What you want them to be thinking...



Training an Elite Squad

Select Advocates Develop Skills for Larger Advocacy Role

Advocacy Training Academy Modules



Case in Brief



Profiled Organization: Feeding America

Partner Organization: Congressional Management Foundation

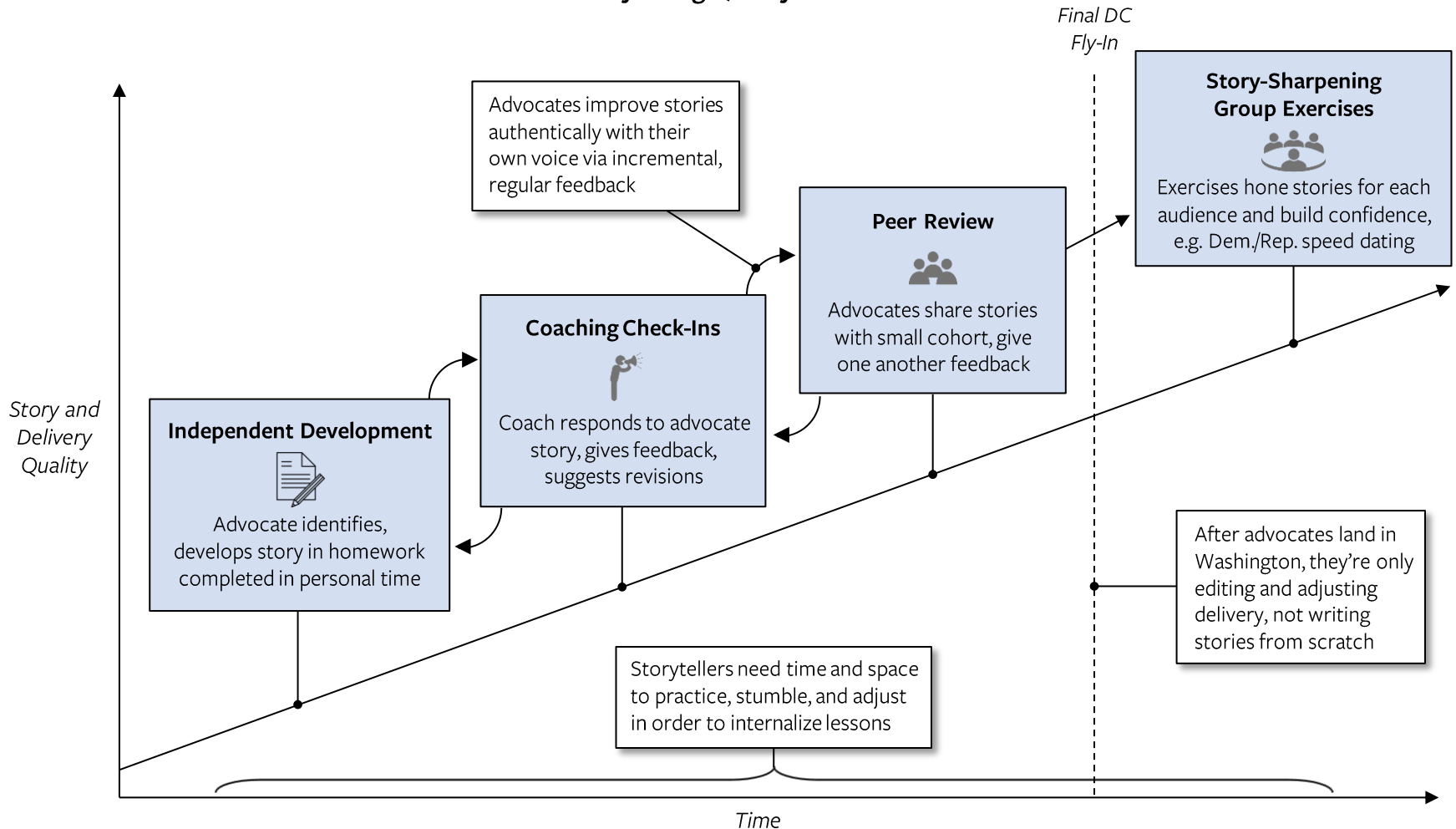
Organization Type: Non-Profit

- Organization invests in small group of advocates with coordinated, long-term training and development program to build skills in storytelling, relationship building, and community mobilization
- Participants develop advocacy skills during two fly-in workshops, four 90-minute webinars, and homework assigned between meetings; expert advocacy coaches facilitate modules and regularly check-in with advocates

Supporting Skills Development

Regular Feedback Loops Elevate Story, Delivery Authenticity

Storytelling Quality Over Time



Catching Unforced Errors

Meeting Checklist Reminds Advocates of Critical Objectives

Advocate Meeting Checklist Tool

NationalJournal LEADERSHIP COUNCIL RESEARCH

Advocate Meeting Checklist

Directions

- 1 Read list to understand your responsibilities before, during, and after the meeting.
- 2 Check items off as they are completed.
- 3 Pay special attention to deadlines associated with preparation and follow-up.

I. Before Meeting with a Legislator or Staff
Prepare effectively for your meeting.

- Read advocacy packet and policy factsheets / backgrounders (2-4 weeks before)
- Identify and practice your story with family, friends, or a colleague (2-3 weeks before)
- Learn your policymakers policy positions - i.e. review their websites, search Google, etc. (1-2 days before)
- Review recent news or social media activity about the policymaker (1-2 days before)

II. During Meeting with a Legislator or Staff
Remember you only have 10-30 minutes to meet with each Legislator. Be polite, professional, and focused on these priorities. Read the list beforehand to be prepared.

- Explain the impact of the policy issue in question through a personal story
- State the specific policy ask and wait patiently for a concrete response
- Write down any questions or policy positions stated by the policymaker or staff
- Leave behind printed materials like booklets or one-pagers

III. After Meeting with a Legislator or Staff
Stay active after your meeting.

- Submit a meeting report to your organizational representative (same day)
- Share your experience on relevant social media sites (same day)
- Write personal, hand-written note thanking policymaker and staff for the meeting (1-5 days after)
- Schedule a follow-up meeting in the district (4-6 weeks after)

If you have any questions, please contact [insert grassroots manager name] at [email address or phone number]

MEMBER TOOLKIT: Advocate Meeting Checklist

II. During Meeting with a Legislator or Staff

Remember you only have 10-30 minutes to meet with each Legislator. Be polite, professional, and focused on these priorities. Read the list beforehand to be prepared.

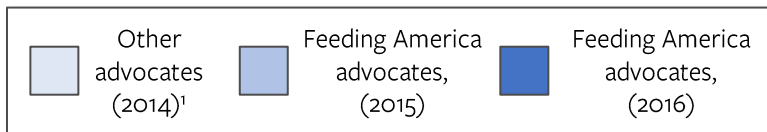
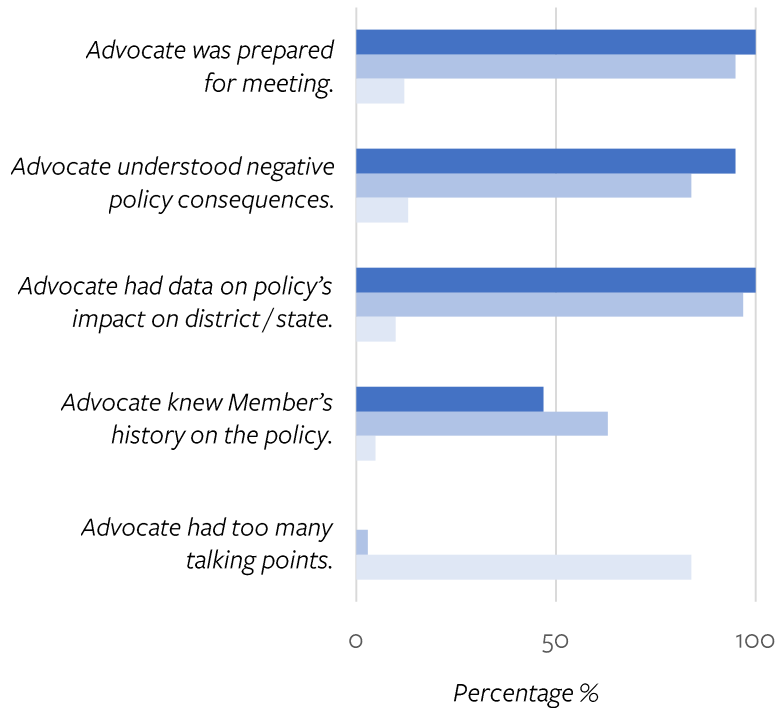
- Explain the impact of the policy issue in question through a personal story
- State the specific policy ask and wait patiently for a concrete response
- Write down any questions or policy positions stated by the policymaker or staff
- Leave behind printed materials like booklets or one-pagers

Reminds users of high-value steps that are often forgotten or skipped by even skilled practitioners

Resource Available in Appendix and Online at www.nationaljournal.com

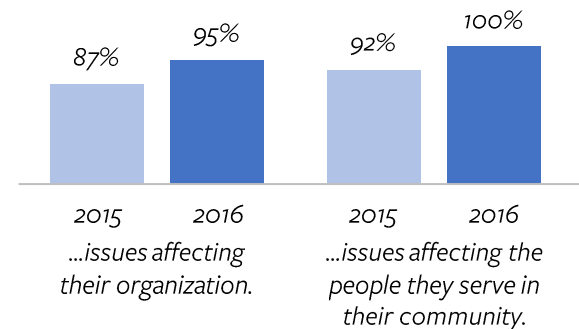
More Influential in Washington

Stronger Washington Communicators



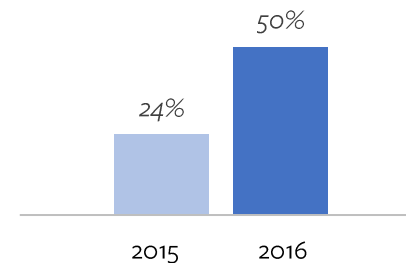
More Trusted by Hill Staff

Level of agreement with the following statement: "The food bank representative(s) I met with is a trustworthy source for accurate and reliable information on..."



Decision-Shapers

Likelihood to support food bank's position in the future, based on meeting with advocate.



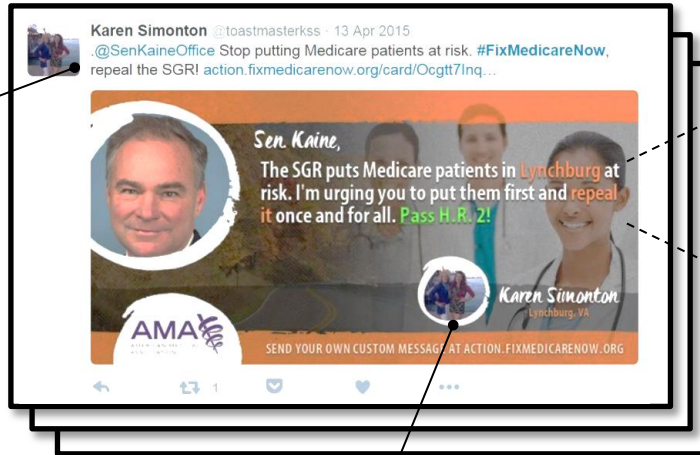
¹: 2014 CMF survey (n=98) asked Hill staffers about typical meetings with advocates from all organizations; data served as control for 2015 and 2016 surveys (n=38, 19), which asked same questions to staffers who met with Feeding America advocates.

Source: National Journal Leadership Council interviews and analysis; Congressional Management Foundation.

Moving Advocates From Private to Public Channels

Reimagined Form Letter Applies Pressure to Policymakers, Compels Response

Example Tweet with Twitter “Card” Graphic



Message shared on public channel to apply public pressure to policymaker

Advocate photo automatically added from Twitter profile picture personalizes message

Messages Offer Choice with Boundaries

Advocate Message Choices

- Practices like mine who serve high numbers of Medicare patients in [your city] continue to be at risk because of the SGR. Pass H.R. 2!
- Please finish the work you started to repeal the SGR. Congress came close to passing this much needed reform and patients in [your city] are counting on you. Pass H.R. 2!
- The SGR puts Medicare patients in [your area] at risk. I'm urging you to put them first and repeal it once and for all. Pass H.R. 2!

Messages are still predetermined by organization, but multiple options are provided to allow advocate to choose one that best represents them in public.

Case in Brief



Profiled: American Medical Association

Organization Type: Association

- Organization creates graphics with policy messages for advocates to share publicly on Twitter, directed at Members of Congress; advocates able to customize graphics with personal photo, name, location, and a message from a curated selection of options
- Advocates gain access to graphics by providing a zip code, email address, and selective access to their Twitter account
- 27,000 cards created and shared in 2 months

Organizing for Collaborative Advocacy



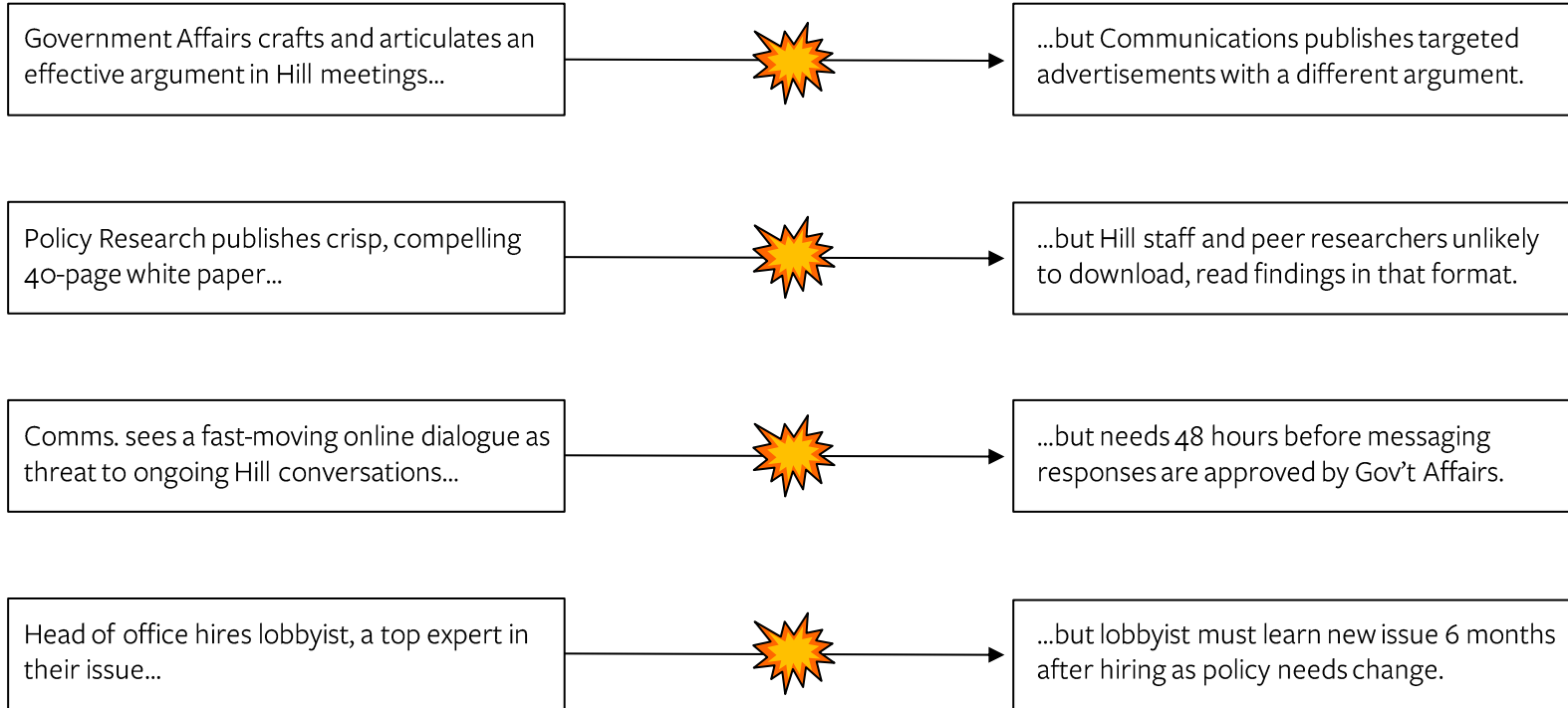
NationalJournalLeadershipCouncil

A Familiar Set of Dilemmas

Departments Independently Successful, Collectively Falling Short

Each Department Firing on All Cylinders...

...Until It Needs to Coordinate



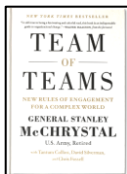
Organizations Plagued by Simple, Unforced Errors

Frontline Staff Lack Understanding of How Their Work Affects Others

Critical Enemy Intelligence Falling Through the Cracks



Case in Brief

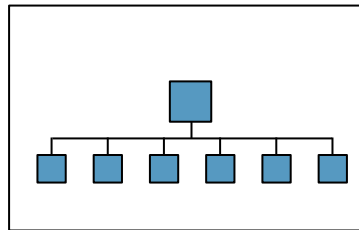


- General Stanley McChrystal recognized early in his command of the Joint Special Operations Task Force in Iraq that the military's efficient command and control organizational design inhibited the Task Force's ability to combat and subdue a lean, resilient enemy in Al-Qaeda
- McChrystal redesigned the Task Force in Iraq, swapping out the familiar organizational hierarchy for a more fluid, adaptable "team of teams" design predicated on far more collaborative relationships between functional departments

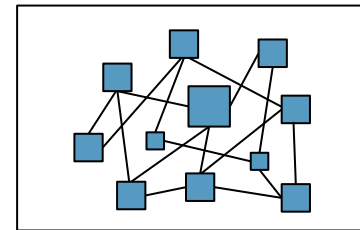
Transforming How the Military Operates

Management Transformation Implemented by General McChrystal

Command



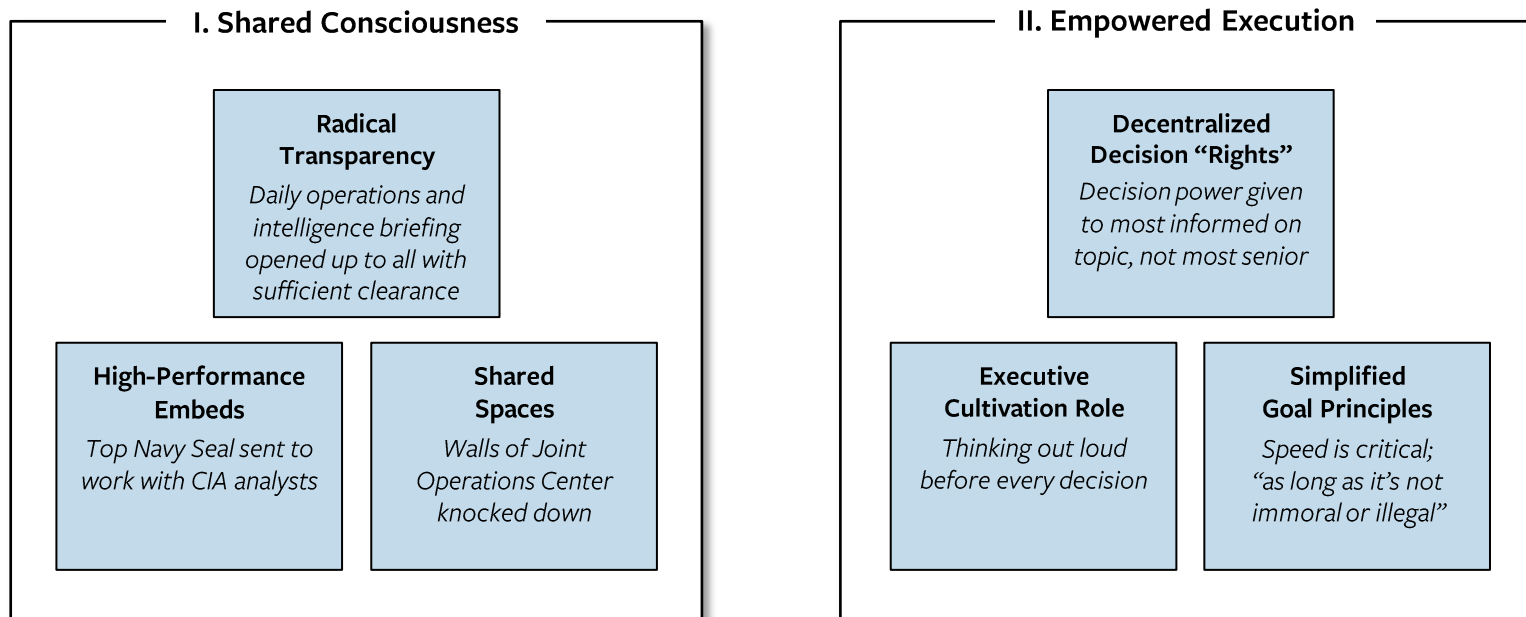
Team of Teams



<i>Organizing Principle</i>	Efficiency	→	Adaptability
<i>Optimal Conditions</i>	Highly Predictable Environment	→	Unpredictable Environment, Constant Disruptions
<i>Decision-Making Level</i>	Top-Down Command	→	Decentralized Decision-Making
<i>Skills Valued</i>	Independent Execution	→	Communication, Trust-Building, Consensus-Building
<i>Executive Role</i>	Sets Strategy, Keeps Trains Running on Time	→	Sets Strategy, Continuous Cultivation of Staff Collaboration, Decision-Making

Engineering a Team of Teams

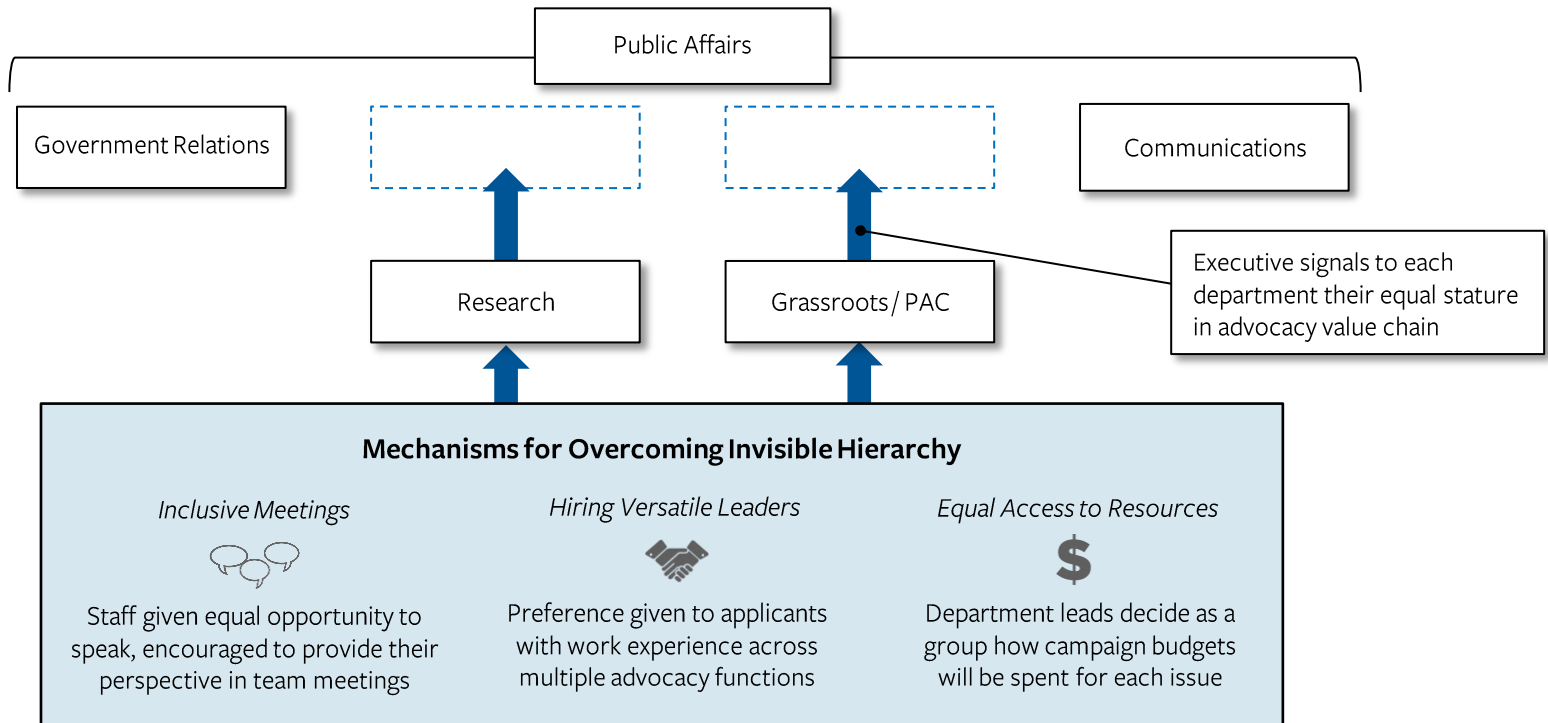
Transition Tactics Employed by General McChrystal



Treating Each Department as a Full Partner

Integrated Design, Executive Signals Counteract Invisible Hierarchies

Integrated Department Structure at U.S. Travel Association



Case in Brief

U.S. TRAVEL
ASSOCIATION

Profiled Organization: U.S. Travel Association

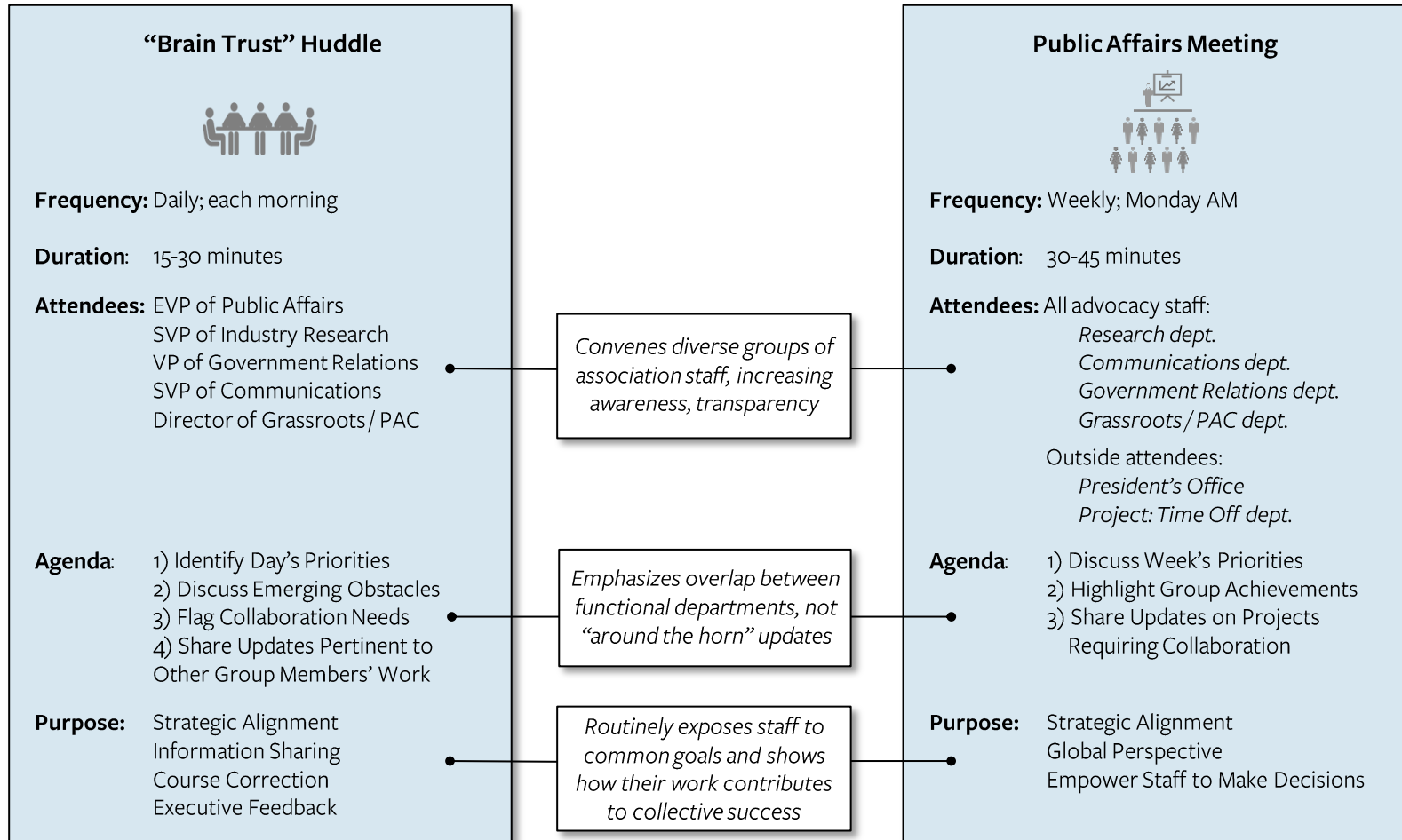
Organization Type: Association

- Organization integrates its four core advocacy functions - Government Relations, Communications, Grassroots/ PAC, and Research - into one Public Affairs Department with a single executive.
- Head of Public Affairs prioritizes team-to-team partnerships through structure, process, and hiring, signaling the importance of collaboration among formerly independent advocacy components.

Clarifying Individual Roles in Group Success

Inclusive Meetings Elevate Common Priorities, Collaboration Opportunities

Interdepartmental Meetings at U.S. Travel Association



Executive Eyes-On, Hands-Off

Enabling Staff to Make Decisions, Solve Problems with Peers

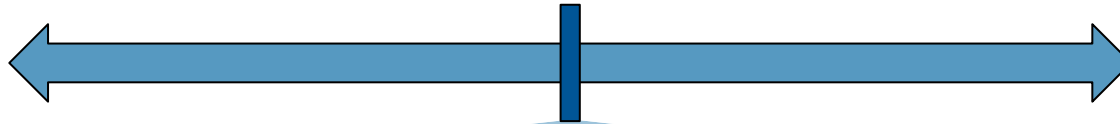
Balancing Executive Oversight and Employee Empowerment

Leader as a “Gardener”

*Employees feel empowered
to make decisions, pursue
common goals with peers*

Too Hands-Off

*Employees feel little
urgency, ownership; likely
to lose focus, dawdle*



Too Hands-On

*Employees feel hesitant,
afraid to take initiative;
likely to defer to authority*

Mechanisms for Encouraging Coordinated Advocacy

Promote Staff Familiarity



- ✓ Rotate staffing assignments to allow different employees to work on projects together
- ✓ Host out-of-office social events to encourage friendships, build trust

Delegate Ownership



- ✓ Clarify which decisions staff are empowered to make without their manager
- ✓ Use daily, weekly meetings to share guiding principles in executive decision-making

Encourage Resourcefulness



- ✓ Push employees to turn first to their peers when addressing emerging barriers
- ✓ Publicly recognize employees who go above and beyond to support a peer in need

Provide Staff Support



- ✓ Provide coaching and access to external training opportunities as necessary
- ✓ Demonstrate a willingness to adjust well-laid plans in pursuit of successful outcome

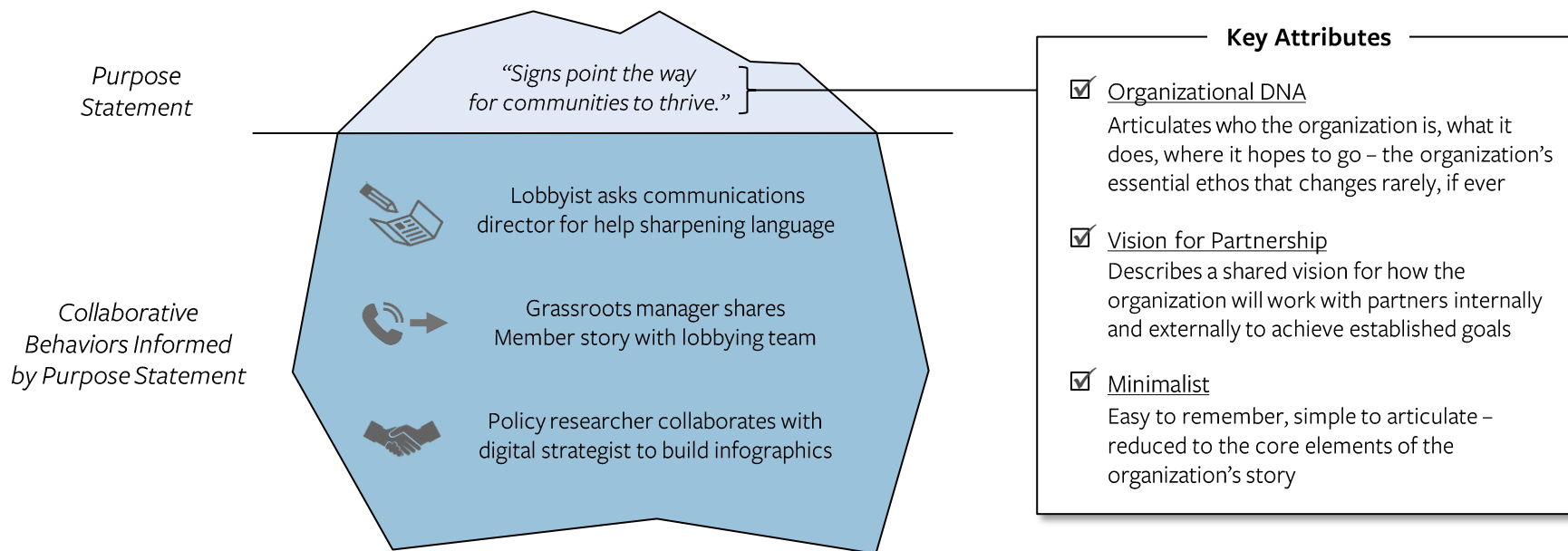
Exportable Lessons

Five Things Any Organization Can Do

- ❑ **Level Hierarchy:** Establish all advocacy staff as full partners in your organization’s advocacy campaigns
- ❑ **Reconcile Conflicting Goals:** Elevate and reinforce shared goals in meetings, daily interactions with staff
- ❑ **Create Forum to Align Tactics Across Teams:** Schedule frequent leadership huddles to adjust to changing dynamics
- ❑ **Elevate Collaboration in Meetings:** Emphasize connections between teams, not information updates
- ❑ **Delegate More Decisions:** Push decision-making to the front line, with clear “decision rights” established

Pursuing Common Purpose

Purpose Statement Guides How Staff Works Together



Case in Brief



Profiled Organization: International Sign Association

Organization Type: Association



Partner Organization: Visionary Leadership

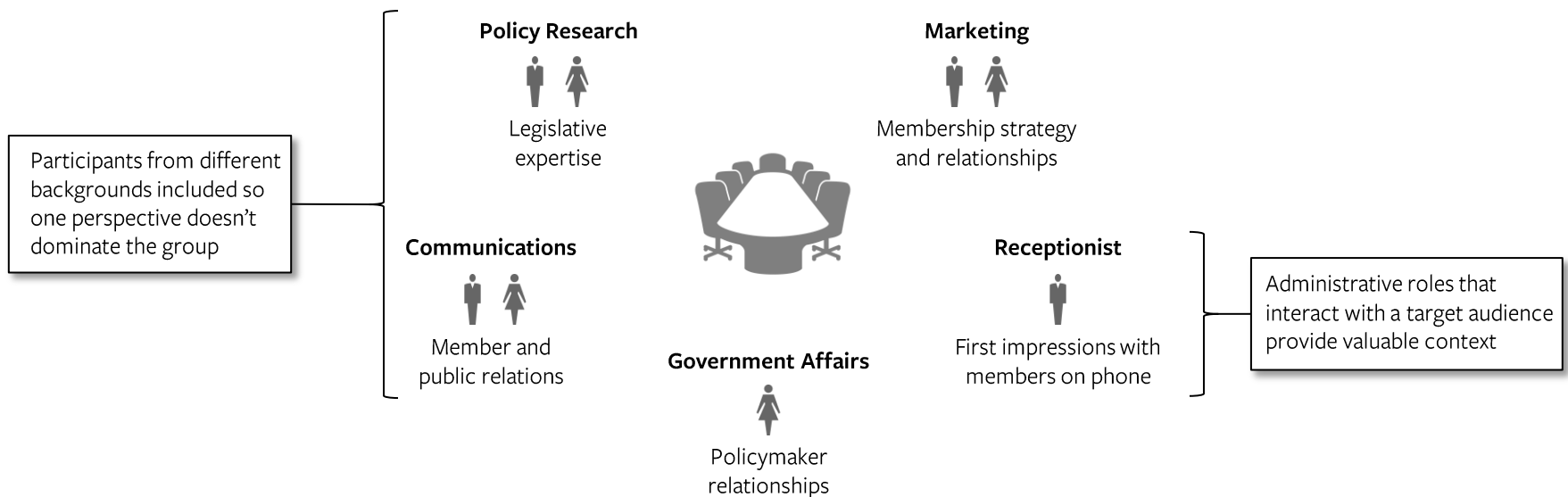
- Organization creates purpose statement to give staff a clear “North Star” direction of what each individual is working toward and coordinate how staff should work with one another across departments
- Statement developed in 2-day-long workshops facilitated by Visionary Leadership

Top-Down Development Likely to Flop

Including Diverse Groups of Staff Ensures Organization-Wide Buy-In

Workshop Small Group Composition and Perspectives

Illustrative



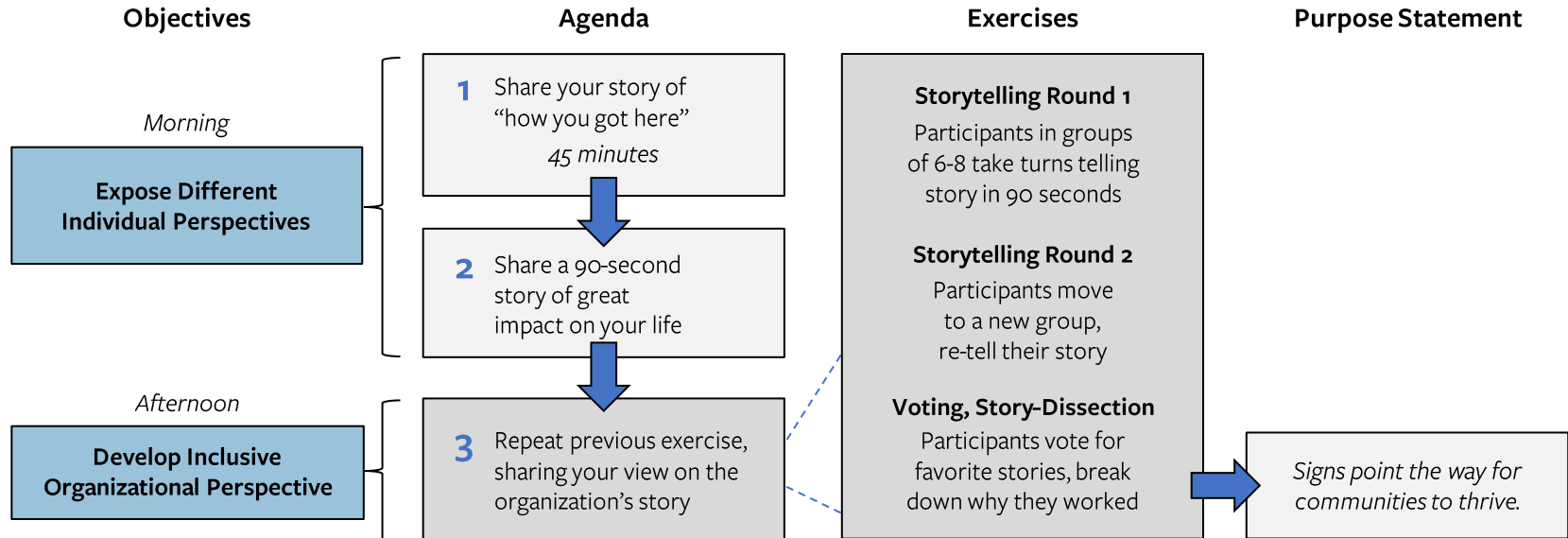
Workshops in Brief

- 2 workshops held at retreats in spring of 2015, facilitated by Seth Kahan of Visionary Leadership
- 1st workshop attended by all 22 staff; 2nd workshop attended by board members, member steering committee, and senior staff
- Retreat objectives were to build a Purpose Statement for the organization, engage and earn buy-in from stakeholders, and define audiences

Building Consensus

Revealing Different Perspectives Clears Path to Finding Common Ground

“JumpStart Storytelling” Workshop



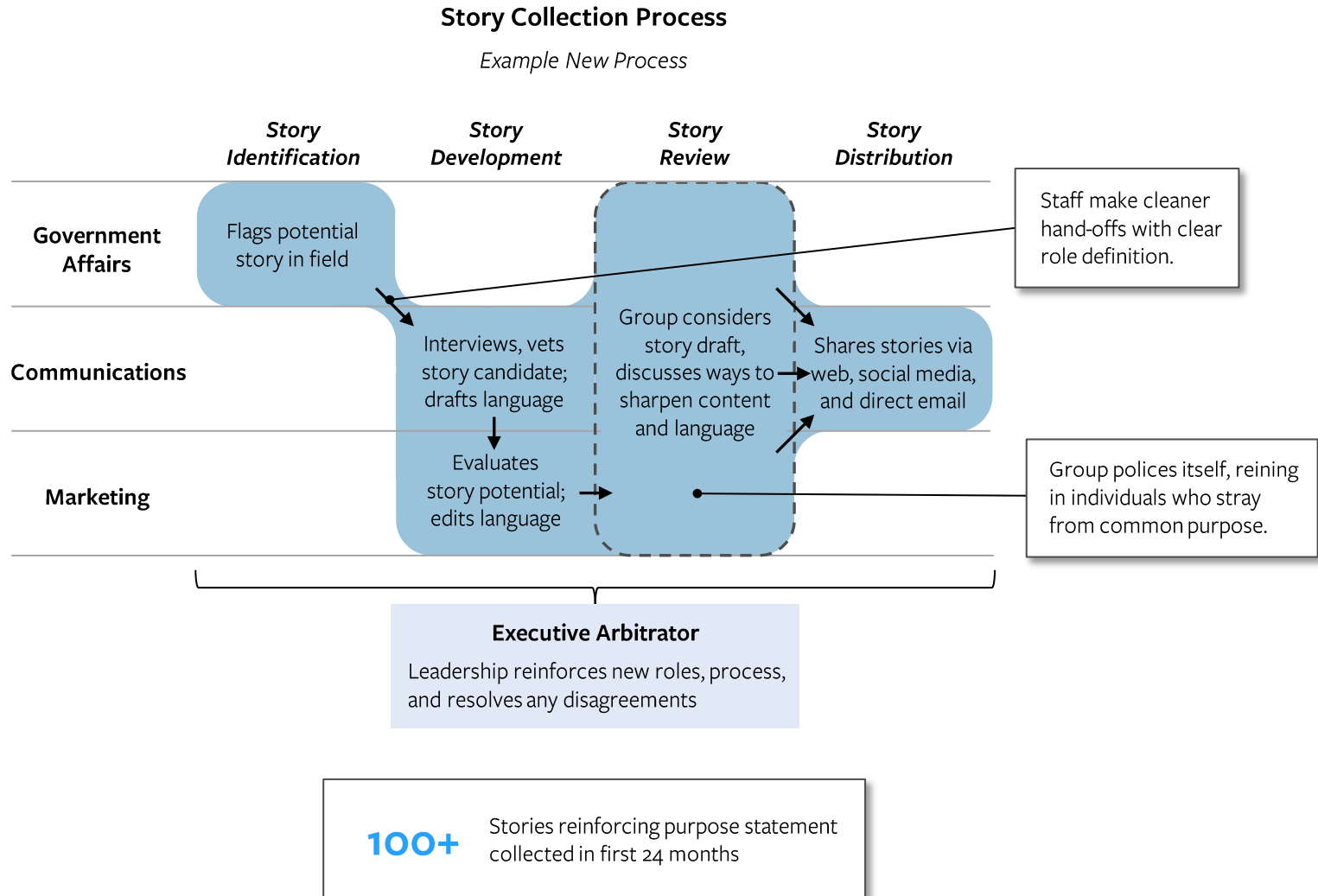
Why Story?



Recent neuroscience has revealed that story structure has a real, pronounced effect on audience focus, memory, and trust. Stories help audiences focus better, retain information better, and let down their guard. They build rapport between individuals by revealing context and values to which the listener can relate.

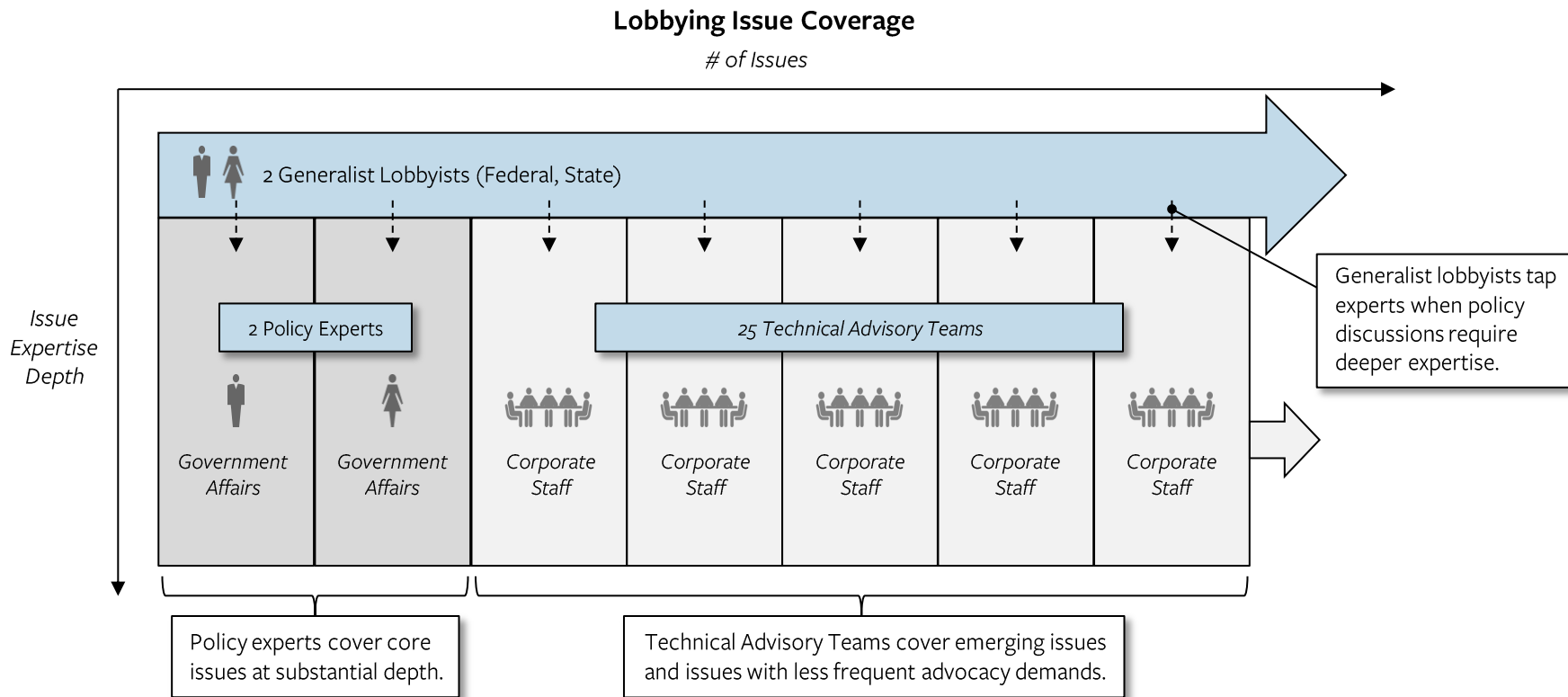
Common Purpose Guides Collaboration

Executive Intervenes Only When the Process Breaks Down



Designing a System of Expertise

Generalist Lobbyists Leverage Policy and Corporate Experts to Manage Expanding Issue Territory



Case in Brief



Swiss Re

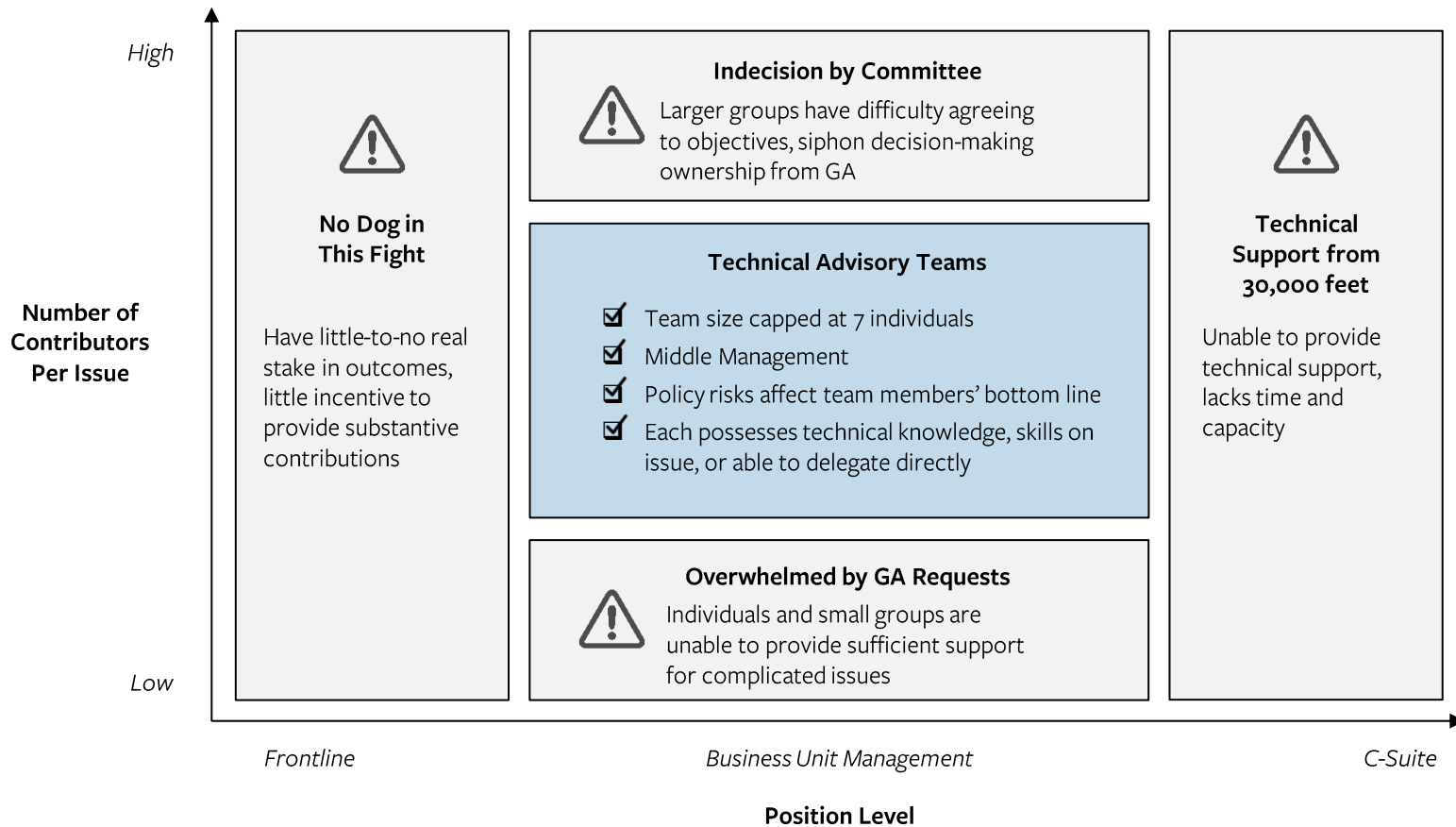
Profiled Organization: Swiss Re Group
Organization Type: Corporation

- Head of office redesigns staff roles in response to an expanding issue portfolio, transitioning from 4 specialized lobbyists with issue assignments to 2 generalists with no assigned terrain and 2 policy analysts with deep expertise in the company's core lines of business
- For non-core issues, the generalist lobbyists forms Technical Advisory Teams comprised of middle management from around company that have a stake in the success of that issue, activating those teams as risks bubble up

Building Teams of Doers, Not Advisors

Team Size and Position Level Have Greatest Impact on Advocacy Support Capacity

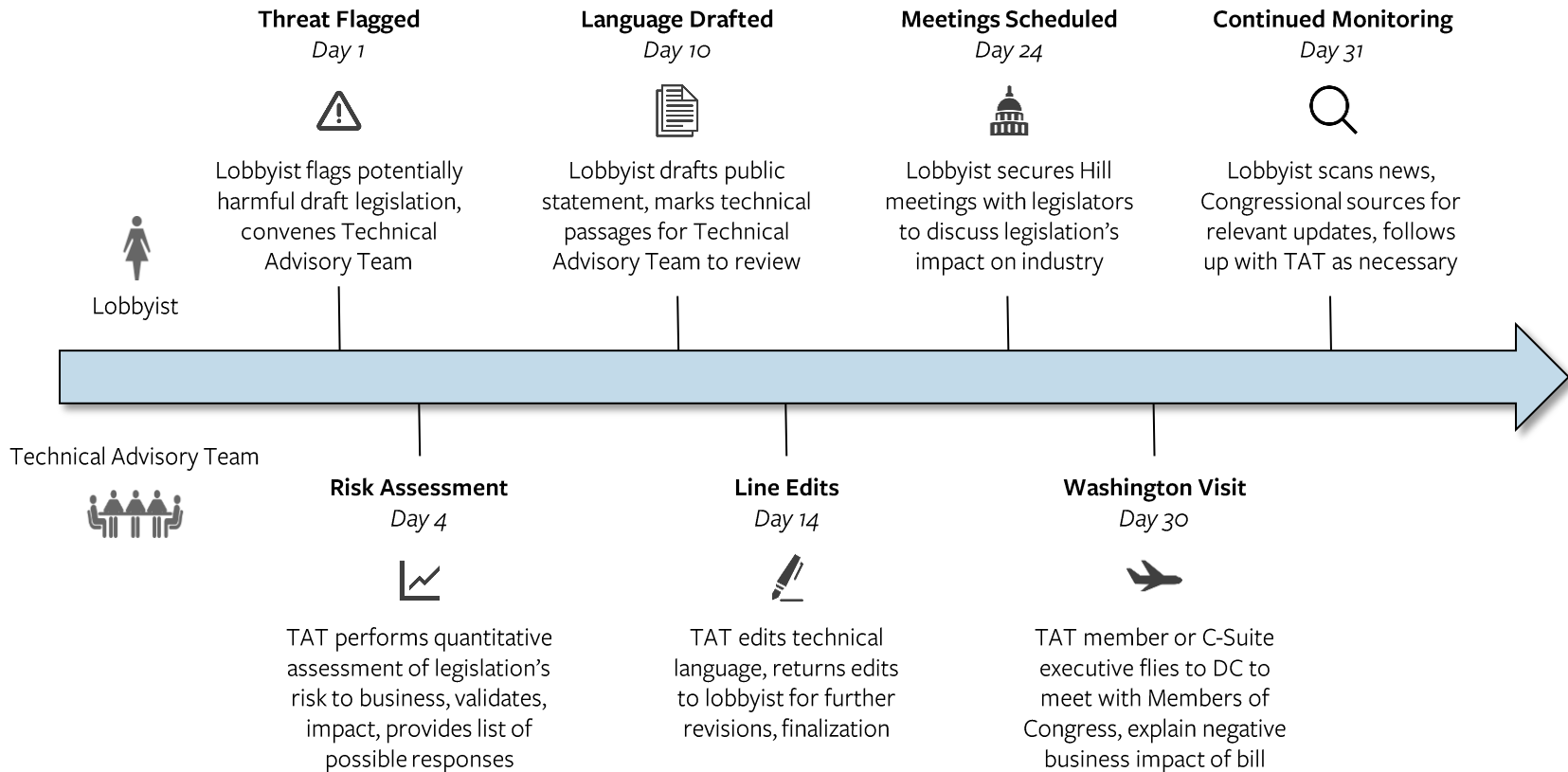
Design Options for Establishing Technical Advisory Teams



Lobbyist Secures Technical Support from the Business

Generalist Lobbyist Leverages Technical Advisory Team to Fend Off Policy Threat

Illustrative



Like Adding 2 FTEs of Expertise

25	x	~25	x	5-7	=	~2
Technical Advisory Teams		Meeting Hours Per Year		Members On Each Team		Full Time Employees

Charting New Channels of Influence

I

Earning a Role in Policy Decision-Making

Sharing Relevant Policy Content

- 1) Branded Content



- 2) Audience-Centric Event



- 3) Thought Leadership Curator



- 4) Inbound Marketing

Enlisting Authentic Messengers

- 5) Ambassadors' Hub



- 6) Advocate Special Forces



- 7) Twitter Cards



II

Organizing for Collaborative Advocacy

- 8) Integrated Advocacy



- 9) Purpose Statement



- 10) Expert Network



Advocate Meeting Checklist



Directions

- 1 Read list to understand your responsibilities before, during, and after the meeting.
- 2 Check items off as they are completed.
- 3 Pay special attention to deadlines associated with preparation and follow-up.

I. Before Meeting with a Legislator or Staff

Prepare effectively for your meeting.

- Read advocacy packet and policy factsheets / backrounders (2-4 weeks before)
- Identify and practice your story with family, friends, or a colleague (2-3 weeks before)
- Learn your policymakers policy positions - i.e. review their website, search Google, etc. (1-2 days before)
- Review recent news or social media activity about the policymaker (1-2 days before)

II. During Meeting with a Legislator or Staff

Remember you only have 10-30 minutes to meet with each Legislator. Be polite, professional, and focused on these priorities. Read the list beforehand to be prepared.

- Explain the impact of the policy issue in question through a personal story
- State the specific policy ask and wait patiently for a concrete response
- Write down any questions or policy positions stated by the policymaker or staff
- Leave behind printed materials like booklets or one-pagers

III. After Meeting with a Legislator or Staff

Stay active after your meeting.

- Submit a meeting report to your organizational representative (same day)
- Share your experience on relevant social media sites (same day)
- Write personal, hand-written note thanking policymaker and staff for the meeting (1-5 days after)
- Schedule a follow-up meeting in the district (4-6 weeks after)

