

# Meeting Checklist

## Step 1

### Identify your allies and targets

Through power mapping you have identified those who actually make decisions, those who have influence over them and those who have a shared interest and who could be willing to support your case. Do they have decision-making power? Can they advocate on your behalf?

## Step 2

### How to get a meeting

You might want to make first contact with a formal, physical letter so your communication is 'on file' and increases the likelihood of an acknowledgement and response. In some regions, email is an increasingly standard formal channel but don't take the risk of it being 'lost' or ignored - use the routes that are available to you. Some policymakers and politicians will have formal processes and rules on correspondence, so if in doubt do your research on this.

If you don't hear back don't be afraid to chase them up. If you don't get an answer, keep trying until you do. Be persistent, but don't go over the top - remember you want your conversation to start on the right footing. An elected representative might be holding advice surgeries and public engagement events, so consider how you might access these opportunities for contact.

## Step 3



### How to prepare for a meeting

Take the time to understand what is important to your target and why. Test your assumptions about how your topic aligns with what matters most to them. If they aren't where you need them to be, focus on how you can close the gaps.

Do your homework; look for common interests with your target. What did they used to do in real life? Which committees and groups are they a member of? What subjects do they tend to raise or make speeches about? Follow their voting and speaking record, and monitor their website and social media feeds.

Distribute a draft agenda well in advance of the meeting and rehearse answers to tough questions and objections.

Mindfully envision the meeting in its entirety.

If you are meeting in person, notice everything; from how you walk into the room, engage with other stakeholders and invite dialogue throughout the discussion to how you will anticipate concerns and self-manage if tension arises. Envisioning the way you want to lead and engage provides the best opportunity for success.

Online meetings are an increasingly common form of engagement - many of the same rules apply. Be careful to familiarise yourself with the meeting platform you are using, your on-screen background, and take steps to prevent any unexpected interruptions or disturbances.

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## Step 4



### In the meeting

Clearly and concisely explain your concerns, tell them about your campaign petition and set out what changes you would like them to make. If you're planning to deliver a petition in person, let them know when you'll be coming to do the hand-in and ask if they can be there to receive your petition and discuss it with you. Remember, always be polite – don't give them any excuses to ignore you and follow parliamentary customs and forms of address.

Find common ground despite areas of disagreement, and focus on building a relationship and respectful rapport. Work to get a clear, concrete and specific commitment from the decision-maker as an outcome. Make sure you build rapport and pay close attention to body language, signals and cues

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## Step 5



### After the meeting

Make sure you follow up with your decision maker: If you get a firm response when speaking, try to make sure you have also got it confirmed in writing. If they've agreed to make changes you're asking for or are supporting you, let your supporters know about your success and use media channels to transmit it. But don't relax just yet. Make sure you agree on a specific timeline and follow them up regularly to check that progress is being made and commitments are being kept to. It is possible your decision-maker won't give you an immediate response the first time you speak to them, so don't let them off the hook – keep following up until they give you a firm answer.

Get your supporters to reach out: If your decision maker is delaying responding to you, or has not yet committed to doing the right thing, contact your campaign supporters and ask them to write to the decision maker too. Hearing from lots more people could tip the balance towards them doing the right thing.