

Meeting with Decision-Makers

Trainer Names: Cristian / Nikki

Learning Objectives:

What skills, knowledge, and attitudes should learners take away from this session?

- Understand that meeting with decision-makers is a tactic that is part of a larger strategy
- Learn a 9-step process for an effective meeting with a decision-maker

Achievement Objectives:

What tangible steps will learners will take to advance real or simulated campaign work?

- Practice using the 9-step process in a meeting with SIM campaign targets

Link to Written Content

Time: 105 minutes (1 hr 45 mins)

Normal = say out loud

Underlined = flipchart this!

Italics = trainer notes/instructions

Bold = key point

Preparing to Facilitate:

All trainers will participate in this training by acting out characters from SIM stories. Lead trainers are responsible for making sure everyone has read (1) their character descriptions and (2) the following guidelines before this session:

Instructions for Trainers/Actors:

As with the Outreach Fair, this activity is most useful if you portray the targets as realistically as possible. For inspiration, think of real-life experiences you have had meeting with decision-makers. Consider these tactics to make the meetings more realistic and difficult:

- **Snowballing/Filibuster:** *Talk through the whole meeting, not letting them get a word in. Make it a presentation, not a dialogue. Focus on all the things that you are doing right. If they get a chance to ask a question at all, find a way to dodge it and return to your monologue.*
- **Deflect Any Ask:** *When they make an ask, give a flowery, cordial, yet entirely non-committal answer (e.g. Q: "Can you commit to ____?" A: "I can't thank you kids more for your hard work around this issue. I appreciate the valuable dialogue we've engaged in here today. I will certainly take your concerns into consideration.")*
- **Bring Your Own Agenda:** *Disregard anything they've prepared and focus the conversation on topics that distract from the team's intended purpose for holding the meeting (e.g. instead of engaging with them about that coal plant, go on and on about the city's recycling program and how forward-thinking your government is). Attempt to keep them from getting to an ask.*
- **Leave Early:** *Tell them you only have a little bit of time. Cut the meeting short and leave.*

- **Send a Staffer:** Trainer plays the aide instead of the target. Say you can't speak for your boss, but will take any feedback back to them. Take lots of notes and defend/explain away all of your boss's actions. (Note: This one should only be used for the second decision-maker meeting).

Anchor: The ANCHOR step invites learners to reflect on past experiences which relate to the learning of the session. (e.g. "Think back to a time when _____. What did that feel like?")

1. Decision-Maker Meeting [30 mins]

Preparation [10 mins]

As Sprogers are gathering for what they think is about to be the Meeting with Decision-Makers training, ask them to get in their SIM groups... and then announce that their campaigns have each been granted meetings with their SIM campaign targets! They have 10 minutes to prepare before the meetings start. Hand out the Decision-Maker Worksheet.

First Meeting [10 mins]

For the meetings, each SIM team's trainer coach poses as the campaign target. See Instructions for Trainers/Actors above.

Debrief [10 mins]

After the meetings, gather back together to debrief in the full group:

- What went well in your meetings?
- What didn't go well?
- What would have helped the meeting to go better?

After hearing reflections, invite Sprogers to take a deep breath with you, or do a shakedown to "shake off" the first meeting experience. Flipchart and read the Learning Objectives only – don't spill the beans yet that they'll have a second chance at the SIM meeting.

Add: The ADD step introduces new information and tools for learners to consider.

2. Why Meet with Decision-Makers? [5 mins]

Remind the group that meeting with decision-makers is a **tactic**, not a strategy. Ask what they think that means and call on a few people for ideas. To drive the point home, explain:

Your whole campaign shouldn't revolve around meeting with decision-makers. Remember, your strategy is your whole logic about how you're going to get your target to give you what you want – and it's probably going to take more than one meeting. Think of these meetings as steps that move you towards your goal.

So, how can meeting with a decision-maker help our campaign? Group brainstorm, flipchart responses. After hearing Sprogers' ideas, ask someone to check out the list in their Sprog packets and read out anything that wasn't suggested. The list in the handouts:

- *Get background info about the situation*
- *Find out what's happened with your issue already*
- *Figure out who else you could talk to*
- *Test ideas/gauge support*
- *Deliver community support (petitions, etc.)*
- *Move the campaign forward (give them information, research, etc.)*
- *Ask for meetings with other people*
- *Establish a relationship*
- *Gather information to inform your strategy*
- *Gain support for specific policy/action*
- *Create accountability (make sure your campaign doesn't stop after a vote)*

3. Preparing for Meetings [5 mins]

Tips for Successful Meetings

Before you get into setting meeting roles and agenda, make sure that you talk about these points with your group and that everyone is on the same page.

- **Know the person you're meeting with.** Think about the individual you're planning to meet with. What values might they hold? What are their responsibilities? What kind of power do they have to make decisions about your issue? Who has influence over them and who are they accountable to? In other words, where are they coming from?
- **Come with questions and goals.** Be clear on what you want to achieve from the meeting. If you want something from the person you're meeting with, be ready to make a specific ask. If you're trying to get information, make sure you know what questions you'll need to ask.
- **Know your deal-breakers.** If you have a specific ask to make and you're preparing to negotiate, be sure your team agrees about what you are and aren't willing to compromise on. Choose your compromise points carefully: there are too many examples where the environmental movement and movements led by mainstreamers have made compromises and thrown marginalized people under the bus. Choose compromise points that stay true to your values.
- **Consider whose voices are represented.** This is both a strategic consideration and an AO practice. If you're meeting with a decision-maker who represents a specific group of people, you should send people to the meeting who belong to that group. If you are entering a community as an outsider or working in solidarity with a frontline community, the people who are most directly impacted by the issue should be in the meeting. They should also be involved with every step of crafting the meeting plan – just as they should be in planning your overall campaign. Speaking roles in the meeting should also be divided up evenly – don't let one voice do all the talking.
- **Have clear meeting roles.** Go in knowing who's doing what and who's speaking when – and don't forget to designate a notetaker!

4. Tricks to Watch Out For [10 mins]

Run this lesson as a skit, with one trainer posing as a decision-maker. Ask for volunteers from the group to make an ask of the decision-maker (Use something silly that doesn't require background knowledge, like asking the head cook for your program to serve pizza for lunch). As soon as the volunteer tries to make the ask, the decision-maker trainer should pull a "trick" from the list. At that point, the second trainer should step in to pause the skit and ask the rest of the group to describe what's happening. Reveal the names of the "tricks" on the flipchart one at a time, after each skit.

- **Snowballing/Filibuster:** *Talk through the whole meeting, not letting them get a word in. Make it a presentation, not a dialogue. Focus on all the things that you are doing right. If they get a chance to ask a question, find a way to dodge it and return to your monologue.*
- **Deflecting Any Ask:** *When they make an ask, give a cordial yet entirely non-committal answer (e.g. “I can’t thank you more for your hard work on this issue. I appreciate the valuable dialogue we’ve engaged in here today. I will certainly take your concerns into consideration.”)*
- **Bringing Their Own Agenda:** *Disregard anything they’ve prepared and make the topics of conversation things that distract from the intended purpose of the meeting (e.g. plans for surveying public opinion on dessert options, presentation on health benefits of staying hydrated during trainings, etc.). Attempt to keep them from getting to an ask.*
- **Leaving Early:** *Tell them you only have a little bit of time. Cut the meeting short and leave.*
- **Sending a Staffer:** *Introduce yourself as the decision-maker’s aide. Say you can’t speak for your boss, but will take any feedback back to them. Take lots of notes and defend/explain away all of your boss’s actions.*

5. The 9-Step Process for Effective Decision-Maker Meetings [15 mins]

Read through the 9-Step Process, elaborating on each point as you go. Pick a few points to illustrate with brief stories from your own experiences.

1. **Introduce yourself and your organization.** Tell a little about yourself (e.g. what neighborhood you live in, your year/major in college), and explain the mission of your organization and who you’re representing. If applicable, tell them that you are from the area/district/school they represent.
2. **Thank them for meeting with you.** Thank them for today’s meeting and for any help or support they’ve given you in the past. Be specific – reference particular policies or decisions if you can.
3. **Build the relationship – Ask questions and chat!** This one depends on what kind of campaign you’re running: the more important and powerful the decision-maker, the less time they’ll have to give you in a meeting, so don’t waste all your time chatting. But this can be a good strategy for college campuses, local government, and other lower-level decision-makers. You can also take this opportunity to learn about them by asking about their position, values, concerns, connections to other committees, etc.
4. **Introduce Your Issue/Concern.** Present your issue and establish your arguments, but keep it to a few main points. Try to connect your argument to their values (to the extent that you know them).
5. **ASK for their support.** Ask them to take a specific, measurable action – for example, “Will you arrange an energy efficiency audit for campus? ...speak in favor of this to the Board of Trustees? ...vote for this proposal?” Assign one person to make a clear and direct request.
6. **LISTEN.** Use the 50/50 rule – they talk half the time! You can learn a lot about a person by listening carefully to how they respond to your ask, so listen carefully. But don’t be afraid to ask questions. If they say no to your ask, you might want to ask why they can’t support your campaign or what would need to change for them to have your support. Also consider asking who else they think you should be talking to about your issue.
7. **Respond and Restate Your Ask.** Briefly restate your argument, addressing any concerns that you heard them raise while you were listening. Then, ask them to take action again. The key point here is not to ask the *same* question twice, but to **make a secondary ask**. There may be a good reason why they can’t or won’t do what you initially ask of them, but that doesn’t mean they can’t or won’t help in other ways or agree to a compromise. If they’re still going to say NO, make them say it twice. People don’t like saying no, and by changing your ask you are giving them another

opportunity to say YES!

8. **Establish Next Steps.** Chances are, you won't get an answer in your meeting, so make a plan to follow-up. Let them know that you'll be calling to follow up by the end of the week, seeking a second meeting, or getting calls into their office from constituents. Review any commitments that were made by you or them and clarify the timeline for action. Then, thank them again!
9. **Post-Meeting/ Follow-up.** Write down what you've learned as soon as you leave, and debrief with others who were there. Share the information with any allies if applicable. Give a call to anyone who helped you prepare and let them know how it went! You might also want to send a thank you note to the decision-maker restating your arguments and any commitments made – and of course, follow through with your commitments.

Apply: The APPLY step invites learners to utilize the new information in a task, challenge, or focused conversation. (e.g. practice, application, case studies, compare, etc.)

6. Decision-Maker Meeting, Take 2 [25 mins]

Preparation [15 mins]

Announce that SIM teams will have a second chance to meet with their campaign targets now that they've had this training. They have 15 minutes to prepare. Remind them to use the tips in their handouts, and that each member of their team should have a role in the meeting. Pass out clean copies of the Decision-Maker Meeting Worksheet.

Second Meeting [10 mins]

Trainers pose as the campaign target again. Use different tricks this time!

Away: The AWAY step invites learners to connect their new understanding to the real world context of their lives. (e.g. a personal action plan, commitment, projection into future, etc.)

7. Debrief [10 mins]

After the practice meetings, come back to the full group to debrief again.

- What worked well in your meetings this time?
- What was the hardest thing about the meeting?
- What was the most important takeaway you learned from the roleplay?

8. Pluses and Deltas [5 mins]

*Collect feedback on the training session by asking Sprogers for training **pluses** (things that went well) and **deltas** (things that could have gone better/could be improved/that are growth zones).*