

Legislative Visits Protocol

Prepare for your Meeting

What to do . . .

- Plan a simple and concise agenda
- Focus on one to two issues
- Prepare a brief handout which outlines key points
- Ensure that information is accurate and factual
- Do your homework
- Know your issue and underlying facts, including (if possible), the legislator's position on the issue
- Designate a lead spokesperson – and have a role for each participant

And why it makes sense

- Keeps the meeting focused
- Creates good use of legislator's and your time
- Helps the legislator to understand and remember your message
- Enhances credibility; strengthens reasons for legislator to support position
- Creates credibility and enhances legitimacy of discussion
- Prevents erroneous presumptions being made
- Makes the delegation appear organized and assures key points are made

Attire

What to do . . .

- Business attire

And why it makes sense

- Enhances credibility and contributes to the "business atmosphere"

Arrival

What to do . . .

- Introduce yourself and present a business card to receptionist
- Address the receptionist respectfully

And why it makes sense

- Assists the receptionist in announcing the meeting
- Each staff member is important AND often knows as much as the legislator about the issues

Meeting

What to do . . .

- Lead spokesperson introduces delegation and hands out any materials prepared for the meeting
- After introduction of the delegation, BRIEFLY mention any personal connections with the legislator, i.e., hometown affiliations, work on campaign, golf partner, etc.
- Don't get sidetracked into social chitchat

And why it makes sense

- Establishes structure to the meeting and gets the discussion off on the right foot
- Establishes rapport, i.e., a friend of my friend is a friend . . .
- You may only have 7 minutes, make sure you get your business done

NOTE: It is a **FEDERAL CRIME** (not to mention inappropriate) to mention anything about **PERSONAL OR ORGANIZATIONAL DONATIONS OR FINANCIAL SUPPORT** made to the legislator while discussing legislation.

Meeting (continued)

What to do . . .

- Stick To Your Agenda. Take the initiative and present the points you want to make.
- Do not talk about other issues such as abortion, gun control, crime, etc.
- Make your Case. Explain the issue, its impact (and make it personal, if possible), NAIFA-California's position, and any supporting data.
- Ask For The Order
- Ask the legislator's position
- Ask the legislator for his/her support of NAIFA-California's position
- Answer any questions the legislator/aide has in a direct and honest manner
- If you do not know the answer to a question, say so, then, offer to find out and follow up

And why it makes sense

- You are representing NAIFA-California and its views only during this meeting
- Discussing issues takes the focus away from the meeting and your role as an "expert" on insurance issues
- A legislator is more willing to support a clearly stated position, backed by accurate facts and figures than one, which is not
- Creates a constituent on the record request and legislator response
- If legislator's position is the same, creates opportunity to express agreement and thanks
- If legislator's position differs, creates opportunity to address concerns
- Reinforces NAIFA-California and its members and knowledgeable resources
- Provides an opportunity for a second exchange (maybe) and ensures NAIFA-California's position is presented and reinforces that agents: are reliable providing valued services to clients and others

Concluding the Meeting

What to do . . .

- Offer to act as a resource to the legislator/aide on pertinent issues

And why it makes sense

- Reinforces the role of NAIFA-California members as "expert resources" on industry issues

Phrases and Words to Avoid

What not to say . . .

And why it makes sense

- "Bureaucrat"
- "In the real world . . ."
- Any racial, sexual remarks
- "I think . . ."

- These are loaded terms. Staying away from them helps keep the listener from being offended. And name-dropping is a competitive sport – you can't win
- Keep your focus on your role as a representative of NAIFA-California on the issues