



Eight Steps to Successful Engagement

Step One →

Begin at the End

Determine the specific goals or objectives to be achieved.

- ▶ Have a clear understanding of why the strategy is being implemented and how the strategy will be executed.
- ▶ Write a summary that clearly explains what will happen if engagement is successful.

Step Two →

Create a Great Introduction

Organize your materials and your thoughts to develop an introduction to your issue.

- ▶ Utilize Frequently Asked Question documents and basic information about your issue, organization, and its mission in order to help you talk about the value of engaging with you and your issue.
- ▶ Use core messages to describe what the issue is, and why it matters to providers and parents.

Step Three →

Do Your Homework

Research your target audience before you contact them. Learn the background and interests of the person(s) you will contact.

- ▶ Know something about your target audience before you talk to them. What are their objectives? Who do they serve? Do they already know about your issue? This will help you customize your message.
- ▶ Find common ground between your priorities and the priorities of your contacts.

Step Four →

Develop Engagement Strategies

Think about how you will approach engagement.

- ▶ Develop an engagement strategy for individuals who are familiar with your issue.
- ▶ Develop an engagement strategy for individuals who are not familiar with your issue.
- ▶ Prioritize the strategies and tactics you will take with each audience.

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Step Five —>

Write a Script

Plan your first engagement.

- ▶ Develop a script or outline of the information you want to share with your targeted contact(s).
- ▶ Identify messages that might help you convey the value of your issue.
- ▶ Pre-determine what next steps you will take if your first contact is successful or unsuccessful.

Step Six —>

Engage

Engage your contact.

- ▶ Plan to make multiple attempts at contacting your identified target(s) in multiple ways.
- ▶ Prepare the information you will deliver in your contact (written documents if you email or specific compelling statements for a phone call).
- ▶ When preparing your information, have a plan for the response you want to receive, and a contingency plan if you receive a response you did not want.

Step Seven —>

Follow Up and Follow Through

Establish a plan to follow up with your target in ways that involve their direct participation.

- ▶ If you have a successful engagement, determine your next step to engage your target through a specific activity.
- ▶ If you have a neutral engagement, determine the potential for additional information to positively influence your target.
- ▶ If you have a negative engagement and determine that no further action is possible, follow up with a note of thanks (never close a door completely or burn a bridge to future engagement).

Step Eight —>

Track Your Progress

- ▶ Monitor your progress.

