

THE SIX STEPS TO SUCCESSFUL ADVOCACY



A resource from Wanda Montalvo, PhD, RN, FAAN

1

KNOW THE ISSUE

- Know the issue and speak to it as if it's an important issue to the decisionmaker.
- Always consider the opponent's point of view and prepare counter points.

2

RESEARCH FOR BACKGROUND AND IMPACT

- Use a systematic approach to gather information to educate yourself; clarify understanding and develop a summary of key points.
- Review national standards and whitepapers from professional organizations, federal agencies, and/or foundations.

3

PREPARE MATERIALS

- Work with co-organizers to prepare materials.
- Remain mindful and align the "ask" with core metrics important to the organization.

4

MAKE MEETINGS THAT WORK

- Set up meetings with gatekeepers—the people with access to decisionmakers.
- Remain objective, leverage data and storytelling, and remember to be succinct.
- Build on feedback to refine the "ask" to make it "yesable" to decisionmakers.

5

FOLLOW UP STRATEGICALLY

- Engage your supports, follow up, and meet with team to debrief.
- Keep decisionmakers informed and updated on progress.

6

REINFORCE AND CELEBRATE SUCCESSFUL ADVOCACY OUTCOMES

- Partial success is a positive gain.
- Build on the small wins to help inform next steps.
- Build upon the relationship with gatekeepers and share credit.