



# TOP 10 Do's and Don'ts

**1 DO be brief and to the point.** Put your Bottom Line Up Front (Think: BLUF) Members and staff have far more requests for meetings than they could ever accommodate. So while it's important to say who you are, where you're from, what your business is, etc. – your main purpose is to get to the ASK.

**2 DO be on time.** Show up 5 minutes early, but not before that because you will crowd their meeting space. Be kind and professional to everyone – especially the person at the front desk. Some bills don't get support from an office just because the person requesting was a jerk. Smile -- you're making a sale, so have fun!

**3 DON'T threaten, promise votes or mention elections.** Saying things that sound like implicit or explicit threats, or veers into elections, is a HUGE mistake – “we have 1,000 workers who can vote for you” or “if you don't cosponsor this bill we'll have to tell our membership in November.” It's typically perceived as hostile and unnecessary. Never mention donations, contributions, or the ESOP PAC in a business meeting.

**4 DO say “I need to get back to you on that.”** If the member or staff asks you something and you don't know the answer, don't make it up or wing it...tell them you will need to get that information and get back to them. It is far worse to give bad information than it is to say you will need to investigate something.

**5 DO get a name/card/contact information for a follow up.** Give them your business card, and ask them for theirs. “Thanks for your time and interest, Ms. Staffer, can we contact you in a couple of weeks via phone and email to follow up?”

**6 DO invite the Member of Congress to your business.** Invite them to take a tour, meet employee owners, and discuss your issues further on their next District Work Period. DO get contact information for staff who'll handle this – it could be a Scheduler or Admin Assistant, but could also be a District Director or home state contact.

**7 DON'T expect an immediate answer.** Nearly every meeting ends with “we'll take a look at it and get back to you.” Also DON'T read anything into what is said -- “I love this idea” or “I support ESOPs” or even “I've cosponsored similar bills in the past” are great, but they are not “YES, I will do what you're asking.” Keep close track of what is said and report those back to TEA, especially questions that need to be answered, commitments that were made, or follow-ups the office requested.

**8 DO read your Representative's/Senator's bio.** Making a personal connection by showing you've done a little research (like on committee assignments) goes a long way.

**9 DON'T talk about or raise issues outside the ESOP agenda.** For these meetings, you are a spokesperson for ESOPs, so stay on topic. A lot of effort has gone into determining the top priorities for these meetings and what would help ESOPs and is achievable. Mixing in personal issue interests can be confusing, or even damage the ESOP community.

**10 DO make the general points of the benefits of ESOPs for EVERYONE.** – ESOPs benefit the whole community -- local job and economic security, dollars stay in the community, better productivity, retirement security, lesser chance of layoffs, and employee owners are happier and more engaged.