

**EFFECTIVE RELATIONSHIP BUILDING &
COMMUNICATION WITH YOUR LEGISLATOR**

KEY CONTACTS TRAINING

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What is the Key Contacts Program?

The power of any statewide association at the Capitol lies in the engagement of its members



KEY CONTACT MEMBERS HELP TAHU BY:

- Educating our state legislators about TAHU's purpose and mission
 - Discussing our current hot legislative topics with them and helping them understand how bills would impact insurance consumers
 - Providing feedback to our lobbyists about the legislator's reaction and opinions
 - Building a strong personal relationship with that legislator over time and becoming their trusted resource on health insurance
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WHY TAHU'S KEY CONTACTS PROGRAM MATTERS:

It's not what you
know, it's what
you do with what
you know.





Surround yourself with the best people you can find, delegate authority, and don't interfere as long as the policy you've decided upon is being carried out.

— Ronald Reagan —

AZ QUOTES

Relationship Building 101

Myth: I have to have an “in” with my local legislator to help TAHU’s Key Contact program

Fact: You do not need any prior connection to be a great Key Contact member!

Fact: You already have an “in” with your legislator - **YOU ARE A CONSTITUENT!**

Fact: You have something your legislator desperately needs: **SUBJECT MATTER EXPERTISE**

Myth: Talking to a legislator is intimidating and scary. I don’t think I’m ready.

Fact: **YOU ARE READY!** Legislators are people, just like you. Think of them as a potential client and go out and **MAKE THE SALE!**

Relationship Building 101

Today we will take you step by step through multiple scenarios to demonstrate how the Key Contacts program can thrive!

- First contact with the legislator and his/her office
 - Coffee or meet and greet
 - Invitation to a Chapter event
 - Follow up conversations on our issues
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Initial Contact 1-2 Punch: Call + Email

- Step 1: WHO DO I CALL?
 - Find out who your legislator is here:
<https://wrm.capitol.texas.gov/home>
 - Coordinate assignment with Key Contacts Chair
 - Click on your Texas Senator and/or Texas Representative for their District Address phone number.
 - **MAKE THE CALL!**

Tips for the first call

- Ask to speak to the representative's/senator's scheduler.
 - When you reach him or her, introduce yourself and state that you're an independent health insurance agent or broker, and a constituent (if applicable) and active with TAHU.
 - State that you'd like to meet with him or her briefly to discuss issues facing insurance agents. Generally, the legislator will have limited time, especially during the legislative session, so it's important to iterate that you'd like to meet briefly.
 - Give the scheduler a window of time that you'll have available. Suggest a local coffee shop or other casual meeting place.
 - Ask the scheduler for his or her email so that you can send a follow-up reminder with your information and thank the scheduler for their time.
 - Ask the scheduler for his or her cell phone number in case of a change of plans.
Save that number!
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Follow up with an email

- After your call, email the legislator and copy the staff person you spoke with.
 - Introduce yourself and your employer. State that you'd like to meet with him or her briefly to discuss issues facing insurance agents. Explain that you are an active member of your statewide association, TAHU.
 - Add a reference to a recent health insurance issue you've dealt with that is being discussed at the Capitol. The weekly TAHU email is a good source of content.
 - Give the scheduler a window of time that you'll have available. Suggest a local coffee shop or other casual meeting place.
 - Calendar a reminder to yourself to follow up by phone and email on a regular basis until your meeting is confirmed.
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First Date: The Coffee Keep it Casual

- Intro yourself and your employer
- Tell them about TAHU and your role
 - Explain our mission and vision
 - Discuss our org structure (statewide membership, multiple Chapters, total memberships, meeting structure, etc.)
 - Highlight our key legislative priorities (Access, Choice, Cost, Transparency)
 - Pick a current issue or two from a recent weekly TAHU news and explain it to your legislator; invite them to join a Chapter event
 - Give a business card, **offer to serve as a resource** on any future healthcare issues;



Second Date: The Chapter Event Meeting the Parents

- By now you have a contact and reference point with your legislator.
- Call the office with a specific request - INVITE THEM TO A CHAPTER EVENT
- Typically they are thrilled to come talk to any group with a critical mass present
- This could look like:
 - Keynote speaker at a Chapter meeting
 - Come by for mix & mingle time pre-meeting
 - Featured guest who speaks for 5-10 minutes



Close the Deal: Become the Expert

- After a Chapter event, follow up to thank them and offer to answer any questions
- Provide reference materials on any specific issues of concern or questions
- Offer to connect them with other resources if they need more perspectives
- Confirm that you are willing to provide subject matter expertise on a going forward basis whenever needed
- Watch the weekly TAHU News email for any new hot topics your legislator might need a resource for - offer to be that resource
- Follow up and check in regularly




YOU CAN'T SOAR
LIKE AN EAGLE
WHEN YOU
SURROUND YOURSELF
WITH TURKEYS

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Relationships take work

That's where we
come in

Be the trusted resource and
subject matter expert when
they most need it



Questions?



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There are no dumb questions!

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