LOBBY DAY PLANNING CHECKLIST: YOUR ROADMAP TO SUCCESS

Successfully navigating a Lobby Day doesn't happen accidentally; it takes strategic planning, execution, and follow-up. This checklist offers a high-level but detailed guide to help you maximize your lobbying efforts.

Before Lobby Day: 3-6 Months Ahead

- **Define Objectives**: Clearly articulate your goals and key messages.
- **Identify Key Participants**: Choose your delegation.
- **Register to Lobby**: Make sure all attendees who will be lobbying are aware of and registered for any required compliance activities.
- **Confirm Dates**: Lock in the date for Lobby Day and get it on everyone's calendar.
- **Strategic Plan Drafting**: Outline your tactics, complete with critical milestones, deadlines, and responsibilities, as well as targets and contact information. Consider various tactics from communications to government or events, endless possibilities.

Before Lobby Day: 2 Months Ahead

- **Initial Stakeholder Outreach**: Identify and contact governmental offices and other stakeholders you aim to meet.
- **Tracking Setup**: Choose a project management tool or CRM to keep track of interactions and outcomes.

One Month to One Week Ahead

- **Execute and Finalize Logistics**: Confirm meetings, make travel arrangements, book accommodations and meals, arrange transportation, etc.
- **Draft Briefing Package**: Include detailed background on meeting attendees, talking points, recommended approaches, meeting rationale, contact information, dos and don'ts, schedule, things to bring or not bring, etc.
- **Create Communication Materials**: Develop and design handouts, one-pagers, and leave-behind items and print and prepare any required materials.
- **Regular Updates**: Keep your colleagues or clients updated on the progress and any changes.

The Day Before: Final Preparation

- **Technology & Material Check**: Ensure phones are charged, backup chargers are available, and all print materials are ready.
- **Re-confirm Meetings and Backup Options**: Verify the time and place for each meeting with attendees.
- **Final Changes**: Ensure that any last-minute changes two days before are shared with the boss or client.
- **Security Reminder**: Re-share a list of items participants should and shouldn't bring.

On The Day: Execution

- **Morning Briefing**: Convene your team for a final overview (or the night before).
- **Execute Meetings**: Stick to your schedule but be flexible for unexpected changes.
- **Client Prep**: Brief participants between meetings.
- **Mid-Day Check-ins**: Use lunchtime or preset intervals to regroup, share intelligence and adjust strategy.
- **Day-of Details**: Have contact information for each meeting and any other last-minute logistics.

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After Lobby Day: Follow-Up

- **Immediate Debrief**: Assemble the team to review what worked and what needs adjustment.
- **Follow-up Actions**: Send thank-you emails and recap what was discussed.
- **Compliance Reporting**: File any required reports or updates as per lobbying legislation.
- **Strategy Revaluation**: Adjust your overarching advocacy strategy based on new insights.

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