

**POLITICO**PRO

# POLICY TOOLKIT

Your complete guide to becoming a policy pro with organizational recommendations and resource guides.



## WHAT SKILLS DO YOU NEED TO BE A POLICY PRO?

We invited POLITICO Pro subscribers to review best practices research with us which revealed that government and public affairs professionals value organizational tools to help them successfully communicate their policy goals. We developed this guide in direct response to that feedback and research. Start learning, perfecting, and sharing these best practices today.

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**ABOUT POLITICO PRO**

# GET ORGANIZED: MASTER YOUR EMAIL INBOX AND CALENDAR

PRO TIP

Use a centralized, digital workspace like POLITICO Pro's Projects tool to organize your work and collaborate more easily and efficiently with your team.



## FOLDERS ARE YOUR FRIEND

Keep your email inbox clean and organized. Create and label separate folders for onboarding materials, unique projects or business priorities, and personal information, so that important information doesn't get deleted or lost in the clutter of your general inbox.



## USE THE "WORK WEEK" VIEW ON YOUR CALENDAR

This gives you easy visibility into your week, without taking up unnecessary space with weekend days.



## COLOR CODE EVERYTHING

Like your inbox, create a system to organize different types of meetings and events on your calendar. Use different colors to correspond with internal meetings, client calls, hearings, personal working blocks, and personal time to accurately reflect deadlines and give stakeholders visibility into your priorities.

# PRESENT EFFECTIVELY: DESIGN A COMPELLING SLIDE DECK

## GENERAL OUTLINE:

- 01** TOPIC AND PRESENTER INTRODUCTION
- 02** ROADMAP OF WHAT YOU WILL COVER
- 03** THE PROBLEM YOU ARE ADDRESSING
- 04** YOUR SOLUTION
- 05** ANY FOLLOW-UP TASKS OR ADDITIONAL WORK THAT NEEDS TO BE DONE
- 06** ANSWER AUDIENCE QUESTIONS

## STYLE TIPS:

Use the 10-20-30 rule for PowerPoints: use no more than 10 slides, talk no longer than 20 minutes, and use a font no smaller than 30pt.

DOWNLOAD OUR COMPLETE GUIDE TO PRESENTATIONS BRIEF [HERE](#).

# WRITE CLEARLY: POLICY BRIEF TEMPLATE

## BRIEF STRUCTURE:

- 01 EXECUTIVE SUMMARY**  
A summary of the problem you are addressing and your recommendation on how best to solve it.
- 02 BACKGROUND**  
A concise summary of the issue with relevant historical and/or technical context.
- 03 RECOMMENDATIONS**  
Qualitative and quantitative findings to explain which of the above options is the best solution to the problem.
- 04 IMPLEMENTATION**  
Execution steps of your recommended policy, including any significant risks, costs, timing barriers, and political implications.
- 05 CONCLUSION**  
A big picture overview of the importance, urgency, and stakes of your policy.

### STYLE TIPS:

Keep your writing concise, objective, and accessible to an intelligent, but uninformed, audience.

DOWNLOAD OUR COMPLETE GUIDE TO WRITING A POLICY BRIEF [HERE](#).

# BUILD RELATIONSHIPS: COMMUNICATE WITH POLICYMAKERS



## 01 Identify the correct Representative(s)

Use lawmakers' voting and co-sponsorship records to your advantage. Ensure that you are meeting with people who support of your policy or are open to hearing your argument.



## 02 Schedule the Meeting

Email the office's Scheduler to submit your meeting request.



## 03 Prep for the Meeting

Do your research so you can discuss your policies with authority and speak directly to the issues that the Member of Congress, or staffer, cares about most.



## 04 During the Meeting

Be professional, objective, and concise to lay the foundation for a positive long-term relationship.

DOWNLOAD OUR COMPLETE GUIDE TO BUILDING RELATIONSHIPS WITH POLICYMAKERS [HERE](#).

# COORDINATE EVENTS: PLAN A CAPITOL HILL FLY-IN

## PRO TIP

Use a Congressional Directory like POLITICO Pro's to find contact and background information, along with voting and co-sponsorship records for Representatives and their staffers.



### 01 Handle the logistics

Pick a date, define the message and goals of your visit, and schedule meetings with the Congressional offices you want to visit.



### 02 Prepare your advocates

Divide your advocates up into delegations of 4-6 and assign them different responsibilities for their meetings, conduct a training session, and provide delegations with communication packets for each meeting.



### 03 Develop a media strategy

Write and share a press release about your fly-in to regional and national media outlets and encourage your advocates to engage legislators on social media.



### 04 Follow-up after the fly-in

Have your advocates send thank you notes to the legislators and staffers with whom they met and reach out to your advocates to solicit feedback and thank them for participating.

DOWNLOAD OUR COMPLETE GUIDE TO COORDINATING FLY-INS [HERE](#).



## ABOUT POLITICO PRO

Go beyond the basics with POLITICO Pro – a personalized solution to help you win policy. We arm our subscribers with exclusive non-partisan news, legislative and regulatory tracking tools, a suite of directories, a library of primary source government documents, and project management tools, so they can achieve their policy goals.

Discover why professionals across the government, corporate, and non-profit sectors have trusted POLITICO Pro's policy tools and news to stay ahead of curve for more than 11 years.

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