

# 5 KEY STEPS TO EFFECTIVE ADVOCACY

## 1 KNOW YOUR OPPONENT

- Who has the authority to give you what you need?
  - Sped Director vs. Team Leader
  - Agency Case Worker vs. Director
- Insurance Company
  - What is the policy/procedure in the given situation?
  - Read the policy manual
  - Know the rules
- What is the personality you are dealing with?
  - How do they usually respond to similar requests?
  - How familiar are they with their own rules and regulations?
  - Do they have specialized knowledge in this area?
  - Do you have anything in common with them?

## 2 BE AN EXPERT IN YOUR FIELD

- Know what you are asking for
  - A new technique
  - A certain piece of equipment
  - A diagnosis
- Have the research handy
  - Let the experts make your case
  - Do demonstrations
  - Take pictures

## 3 BE CREATIVE

- You have all the answers!
- Craft a solution right from the beginning
- Work backwards from there
- Keep it simple
- Use visuals if you can

## 4 COMMUNICATE EFFECTIVELY

- Take the emotion out of it (unless you know that works with your opponent)
- Be clear
- Be concise
- Practice if you need to
- Use written tools to assist you

## 5 BE PREPARED TO...

- Compromise
- Lose some
- Be upset (behind the scenes)
- Be patient
  - Your timelines are yours (and not anyone else's!)
  - It took you a long time to learn, too!