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
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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!