



Instructions for Scheduling Legislative Meetings/Appointments

Most offices generally request that any type of meeting/appointment request be faxed in first. Give the office at least one or two business days to consider your request, and then call them in order to:

1. Make sure they received your fax
2. Find out if the member has approved the request or if another person in the office has decided to take the meeting instead.

In the event your request has not yet been considered, ask when would be the best time to call back.

General Call-Back Script

“Good morning/afternoon, my name is your name and I am with the NAIFA-Chapter Name. How are you today?”

--Response--

“I would like to speak with whoever is in charge of scheduling for the member please.”

--Response--

(Once on the phone with appropriate person, please identify yourself again)

“I am calling regarding a fax I sent on date regarding a meeting request for NAIFA-Chapter Name on date. I am hoping to work with you to schedule a meeting with Senator/Assemblyman/Assemblywoman last name between the hours of time and time. We will be bringing number constituents of the member’s district that day and they would like to discuss various insurance related issues with their representative.”

--Response--

Additional Information & Instructions

Many times a particular member may be in committee, session, another meeting, or will just be unavailable that day. Therefore, if he/she is unavailable, be sure to mention that you would be more than happy to schedule a meeting with either the member’s chief of staff, legislative director or whoever in that particular office deals with insurance issues. If this is the case, get the person’s name (with correct pronunciation/spelling) and position in the office, along with their direct line – if applicable.

Make sure to get the name of the person you talked to, so in the event you need to call and cancel/reschedule you can ask for them directly. Also, when scheduling these meetings, it is wise to document each call. Write down the day, time of the call, along with the actual scheduled meeting date and time. This way, if there is any discrepancy with the office you can recall your records.

If you have any questions or concerns regarding these instructions, please contact Lauren Kimzey with McHugh and Associates at (916) 930-1993. In addition, please forward all scheduled appointments to Lauren at lkimzey@mchughgr.com. You may email them in appointment card, iCalendar or message form. Thank you!