

Individual Meetings for Organizers

By Ari Lipman

Purpose

Our individual meeting workshops at national training tend to be oriented toward leaders who are doing individual meetings inside their congregations or in their broad-based organization as a supplement to their daily responsibilities. Our best-case scenario is that they will do a handful of individual meetings a week. Our training is geared toward preparing them to take on this change in their behavior, to de-mystify the process, and to convince them that it is valuable.

For an organizer who is responsible for building an organization at the pace of 20-25 individual meetings per week, this training alone can be insufficient. All IAF organizers have experiential knowledge that helps them approach every individual meeting differently to maximize its likelihood of success. What follows are some insights that I have found useful in my individual meetings. Some of these principles have been suggested to me by supervisors. Others I've learned by trial and error. I think it would be useful for myself and other organizers to begin compiling "tips" for successful individual meetings. Here are mine:

Principle 1: The Individual Meeting is an Action

It has become a cliché to say that an individual meeting is an "action." But what is the re-action that we seek? I suggest that the reaction we are seeking in every first individual meeting is two-fold:

1. The person is agitated to act more aggressively on his/her interests
2. The person wants to do so in relationship with the organizer

Every tactic we use in a meeting must be calculated to achieve these re-actions.

Principle 2: Be Interesting

In order to get the reaction we want, the organizer first and foremost needs to be interesting to the potential leader. If the organizer is not interesting, there is no desire for a relationship, and if there is no relationship, agitation to action is not possible. Every organizer should be pre-occupied with the question: what will make me interesting to this person? Your goal should be to come off as the most interesting person they have met all week/month/year.

Principle 3: Stories are Interesting

Every organizer should have a minimum 10-15 well-developed, rehearsed (but not too polished) stories prepared to tell at appropriate points in an individual meeting. These stories should include:

- Family origin (several)
- Why you became an organizer
- Times you were acted on by dominant power
- The moment when you developed an interest in building power
- Times when you successfully organized a victory
- Personal stories that relate to an organizing universal

All of these stories should be told with a double purpose in mind:

1. To share more about yourself (and thereby encourage reciprocity in sharing stories)
2. To demonstrate your wisdom of how life experience can be interpreted into universal insights that resonate with your individual meeting partner's story.

This is where having a depth of life experience both inside and outside organizing is a tremendous asset. If you haven't accomplished a lot yet professionally, or if you haven't researched your family's history, or if you haven't studied American politics and social movements, then you won't have a lot to offer a potential leader. This can be a big stumbling block for new, inexperienced organizers, so it is especially important to think out in advance which stories you can tell that will make you interesting.

Principle 4: Being Interested is Interesting

Most people find it interesting when someone is sincerely interested in them. I usually find it useful to listen to several stories first, elicited by probing questions, before I talk at any length. The more I listen, the better I can calibrate which stories I want to tell. I must constantly be thinking and calculating as I am listening, without looking like I am thinking and calculating, "what will make me interesting to this person? Which stories should I tell?"

By asking thoughtful questions and challenging people in their thinking (in a way appropriate to the depth of the relationship), an organizer will make a lasting impression.

Principle 5: Being Worldly is Interesting

The best leaders will be curious about the world and attentive to what is going on. You need to match this and convince them that you can help them understand and act in the world better than they can without you.

This means you need to read the newspaper every morning and, if it seems appropriate, raise a news item for discussion in your meetings. It also means you need to be reading books – both fiction and non-fiction – that you can refer to, discuss, and recommend in your meetings. Some

of my best meetings have resulted from a topical discussion stemming from a book that both of us had read recently.

Principle 4: Know your audience

Every individual meeting is different, and you should calibrate your meeting based on what you know of the individual. This means that advance research is essential – especially with key pastors and high-level civic and congregational leaders.

We frequently say that an individual meeting is an art, not a science, and this means that we need to have the judgment to know when to through aside the “rules” for the sake of a good individual meeting.” For example: The duration of an individual meeting is not set in stone.

- “Power” people may frequently only give you twenty minutes and expect you to go straight to business. You can’t act too far outside their experience without them thinking that you are wasting their time.
- If you have successfully engaged a “power person” with whom it is difficult to get an appointment, don’t arbitrarily cut off the conversation at 30-45 minutes. Take as much time as they are willing to give you to deepen the relationship. They will cut you off when they are done.

Principle 5: Know what they are looking for in a first meeting

We are clear in what we are looking for in a first individual meeting: anger, edge, humor, leadership history, social networks, relationality. But what are our potential leaders looking for? In a word, character. They are looking to discern if this is a person with whom they want to relate.

They may be looking for information on the organization, but information is not going to engage them. The organizer is.

Principle 6: Agitation is possible...inside of a relationship

It is unquestionably the job of an organizer to agitate people into action. However, if you try to light too much fire under the behind of a stranger, the only thing you will burn is your potential for a relationship. Agitation is advice – advice to act more aggressively on ones’ self-professed interests. Very few people accept advice just on the merits of the advice itself. They accept advice from people they trust, and they ignore even good advice from people they distrust or don’t know.

This is especially a challenge for young organizers, who must ask themselves, “Why would that 55-year-old pastor take advice from this 23-year-old organizer?” Because the pastor will be asking themselves that same question, and will likely find it presumptuous (and irritating) for a 23-year-old stranger to be telling him/her what to do.

On the other hand, agitation when delivered wisely and appropriately can make you more interesting to a person. Furthermore, it isn't helpful to establish the context for a relationship that doesn't lead to action together. This is frequently the most difficult line for a new organizer to walk.

Principle 7: Next steps must come out of the meeting

The worst stereotype of organizers is that we seek to “use” people – to plug them in to a pre-determined slot. It is impossible to build a power organization out of people who feel used, for the simple reason that our volunteers will withdraw their consent and stop showing up. So it is imperative that an organizer never give off even the faintest hint that we are looking to “use” people or asking them to do something that is not in their self interest.

However, we are clear that our job is to build a power organization by developing leaders who can move into action, and that is what we are looking for in our individual meetings.

Every meeting with a potential leader should end with a next step towards this goal, but that next step must spring organically from the conversation and the interests that the leader shared. Thus, the organizer must simultaneously be inside the meeting and outside the meeting – inside engaging the potential leader, but outside thinking through appropriate next steps based on how things are going. Fortunately, nine times out of ten, next steps in a first individual meeting fall into one of the following two categories:

- How can you help to build power by expanding our network of organized people? (in declining order of desirability):
 - Pull together people (house meeting of people who share the same interest, clergy group, congregation leadership team, etc.)
 - Introduce organizer to people who have similar concerns
 - Give organizer names of people who have similar concerns
 - Attend a meeting with other people with similar interests.
- How can you help me understand the world better?
 - Another meeting to go in depth on a particular topic.
 - Recommendations on things to read or experts to meet
 - In rare cases, the establishment of a mentoring or advising relationship

If the “potential leader” in the course of the meeting presents as a person who is not in fact a potential leader at all, no next step is necessary.

Principle 8: Give people a context

Most people we meet have never been to an individual meeting workshop. On the other hand, at some point in their lives they have likely met with a person individually for the purpose of getting to know them better. The first individual meeting is going to be both inside and outside their experience. It is therefore helpful to give a quick orientation to the meeting before jumping it. For example:

“Thanks for meeting with me. I was speaking with Pastor Moss about building a new interfaith coalition of congregations that could turn things around in Cleveland, and he recommended that I get to know you and learn a bit from your experience working in the city. Are you a Cleveland native?” With this bit of context, I can jump into the relational part of the meeting without getting bogged down upfront with the organizational/business aspect of the meeting. I can then share more about the organization through my own story about how I became an organizer when I reciprocate the story of how this guy came to Cleveland.

For some people, especially those whose position of power makes their schedule particularly tight, their instinct is to talk all business up front, with little interest in the relational back-and-forth that we know is so important. It’s not usually helpful to say, “Let’s talk about that later. First I want to talk about you and me.” That’s too far outside their experience. Instead, strategically work relational stories and questions into the business conversation. Sometimes this will lead to a complete change in tone of the meeting. At the very least, you will generate a little gristle to hold the relationship together for a future meeting.

Principle 9: Keep the relational content going

In subsequent individual meetings with top leaders, never jump right into the business of the organization. If the leader has stuck with the organization, it’s because he genuinely respects and appreciates you, and values you in his life. You probably feel the same way. That’s not ancillary to organizing; it’s the glue that holds us together. Don’t forget to nurture it.

With some leaders, I will spend 90% of the meeting on “relational” content – catching up, talking politics, etc. – before getting to the 10% of business at the end. That ratio is a bit skewed to apply to every meeting but can be appropriate for some leaders. The point is: the continued development of the relationship with your key leaders is just as important as the organizational business and next steps you have come to discuss.