

TRAINING MANUAL : Q3 2019

MAKING THE BUSINESS CASE

► BUSINESSFORWARD

INTRODUCTION

If we want to modernize America's schools, fix our highways, win the clean energy race, increase exports, and make health care more affordable, we need to convince undecided Americans in the middle. We should start by answering their questions about jobs, costs, economic opportunity, and government waste.

In other words, **we need to make the business case for action.**

Business Forward has helped more than 150,000 business leaders brief policymakers and work with local media, publish op-eds, testify at public hearings, lobby members of Congress and the White House, and advocate online.

They have appeared on CNN, MSNBC, CNBC, FOX News, and hundreds of local broadcast and radio stations. They've been featured in national outlets, like the Wall Street Journal, New York Times, Washington Post, and hundreds of local papers.

We've also helped business leaders submit testimony to state legislatures, EPA, DHS, House Ways and Means, Senate Finance, and the White House.

We're here to help you make the most of your time fighting for the issues that you care about. This manual is intended to help you get started.

The New York Times



CHICAGO
SUN★TIMES

Bloomberg
Businessweek



MILWAUKEE • WISCONSIN
JOURNAL SENTINEL

THE PLAIN DEALER
CLEVELAND.COM

The
Washington
Post

MSNBC

THE SACRAMENTO BEE

PUGET SOUND
BUSINESS JOURNAL

THE
HILL



Pittsburgh Post-Gazette

THE WALL STREET JOURNAL.
WSJ

The Detroit News

8 RULES TO FOLLOW

1: MAKE THE BUSINESS CASE

You have a business to run, so you want the time you volunteer to be meaningful and efficient.

We focus on the business case for three reasons.

1. The questions undecided Americans are asking tend to relate to jobs, taxes, economic opportunity, and government waste. And they trust business leaders more than politicians.

- *I'm happy with the health insurance I get through work. What does repealing the Affordable Care Act mean for me?*
- *I want to do something about climate change. Can we afford it?*

2. Undecided Americans understand most public policy decisions create winners and losers. They want to know how a particular bill or issue will affect their industry, their town, and their employer.

A business leader can explain the connection between national issues and her local economy in ways that matter.

- *I'm a home builder: here's what the Republican tax plan means for businesses like mine here in Ohio.*
- *I manage farms in Utah and California: here's what climate change is doing to my crops – and what it means for American agricultural jobs and exports.*

3. A data-driven, results-oriented approach helps depoliticize contentious issues.

Consider these examples:

- *A software executive encourages his school board to support a new charter school specializing in IT and software coding, arguing that he'll have to hire from out of town if local schools can't produce qualified graduates.*
- *Automakers and suppliers explain to climate change deniers in Congress how severe weather caused by climate change is affecting auto supply chains and assembly plants – causing plant shutdowns that cost \$1.2 million/hour.*



When several of America's best CEOs get together with the companies that insure your home, the analysts who rate your company's bonds, and the investors who help manage your 401(K), it pays to listen.



– JIM DOYLE
BUSINESS FORWARD

The Detroit News

2: UNDERSTAND YOUR MISSION

Business leaders generally contribute to the debate in one of three ways.
Before you speak out, be sure to understand which role you're playing.

1. Raising awareness about a problem.

For example, to push education reform, a business leader can explain the long-term cost of failing to modernize her city's schools. She can demonstrate the problem is real; solutions make sense; and gridlock is expensive.

"I need to hire 20 software engineers over the next three years. And I really want to hire local, but our local schools aren't producing enough engineers."

2. Pushing specific provisions or concepts during a legislative process or budget negotiation.

For example, a business leader can use negotiations over corporate tax cuts to make the case for a carbon tax that would encourage clean energy and pay for new infrastructure investment.

"If we want to cut corporate tax rates and at the same time spend more on infrastructure and defense, we need to consider a carbon tax to provide more revenue. It will also reduce carbon emissions and help America win the clean energy race."

3. Helping close a deal, supporting a tough vote.

Today, it's too easy for special interests to derail needed reforms. Even allies can block a "good" deal because it's not "perfect."

For example, a business leader can explain why "weak" environmental provisions in a trade deal are better than the alternative: no environmental protections, at all.

"You may be right that the environmental protections in President Obama's Trans-Pacific Partnership don't go far enough. But if this deal fails, China will step in with its own deal. And China's deal won't have any environmental provisions at all."

“

As Congress and the White House look for ways to pass a new budget and avoid yet another government shutdown, leaders in both parties are searching for common ground. They should start with providing permanent protection for Dreamers and finish by modernizing our antiquated immigration rules.

”

- ROBERT ROCHE

PRESIDENT, ROCHE ENTERPRISES,
USING THE [OCTOBER 2017] BUDGET
IMPASSE TO PUSH BIPARTISAN
IMMIGRATION REFORMS PROPOSED
EARLIER THAT YEAR.

3: HAVE A CLEAR OPINION

“On the one hand... but, on the other hand...” won’t help a Member of Congress decide how to vote, and newspapers are unlikely to publish an op-ed that fails to pick a side. **If you’re going to speak out, be clear.** Support a bill. Raise an alarm. Provide cover on a tough vote. Avoid equivocation.

CASE STUDY

CLIMATE CHECK: US INVESTORS ‘LACK DATA ON CLIMATE RISK’

By Jon Hurdle

mni

...Smith Insurance Agency in Helena, Ark. has been writing fewer home-owner policies in recent years because premiums and deductibles have soared, while policyholders have avoided making claims for fear of not getting their policies renewed by risk-averse underwriters, said owner Kevin Smith.

An owner of a typical 3,000-square-foot house in Smith’s market is now paying \$4,000 a year to insure the property, more than twice the rate of five years ago, while the deductible for such a property has surged to \$2,000 from \$500 over the same period.

**MAKES THE COST
RELATEABLE
BY STARTING WITH
IMPACT ON A
SINGLE CUSTOMER.**

Over the last two years, premiums have risen about 20%, he said, and that’s straining homeowners’ ability to maintain coverage or forcing the mot choose between insurance and other purchases.

“People are getting to the point where they can’t afford homeowners’ insurance any more,” he said. “There’s a huge cost to our customers and to our economy because it means they will have less to spend on other things.”...

To slow greenhouse gas emissions, he urged governments to impose a carbon tax, which would fall most heavily on the biggest producers - the power-generation industry - forcing it to pay a tax that is already effectively levied on all those who feel the effects of climate change.

“The people who didn’t cause the problems are having to pay for it,” he said.

**PIVOTS FROM
SINGLE EXAMPLE
TO INDUSTRY.**

**EXPANDS FROM
INDUSTRY TO
ECONOMY AS
A WHOLE.**

**DESCRIBES
PROBLEM AS
MARKET FAILURE
AND PROPOSES
MARKET-DRIVEN
SOLUTION.**

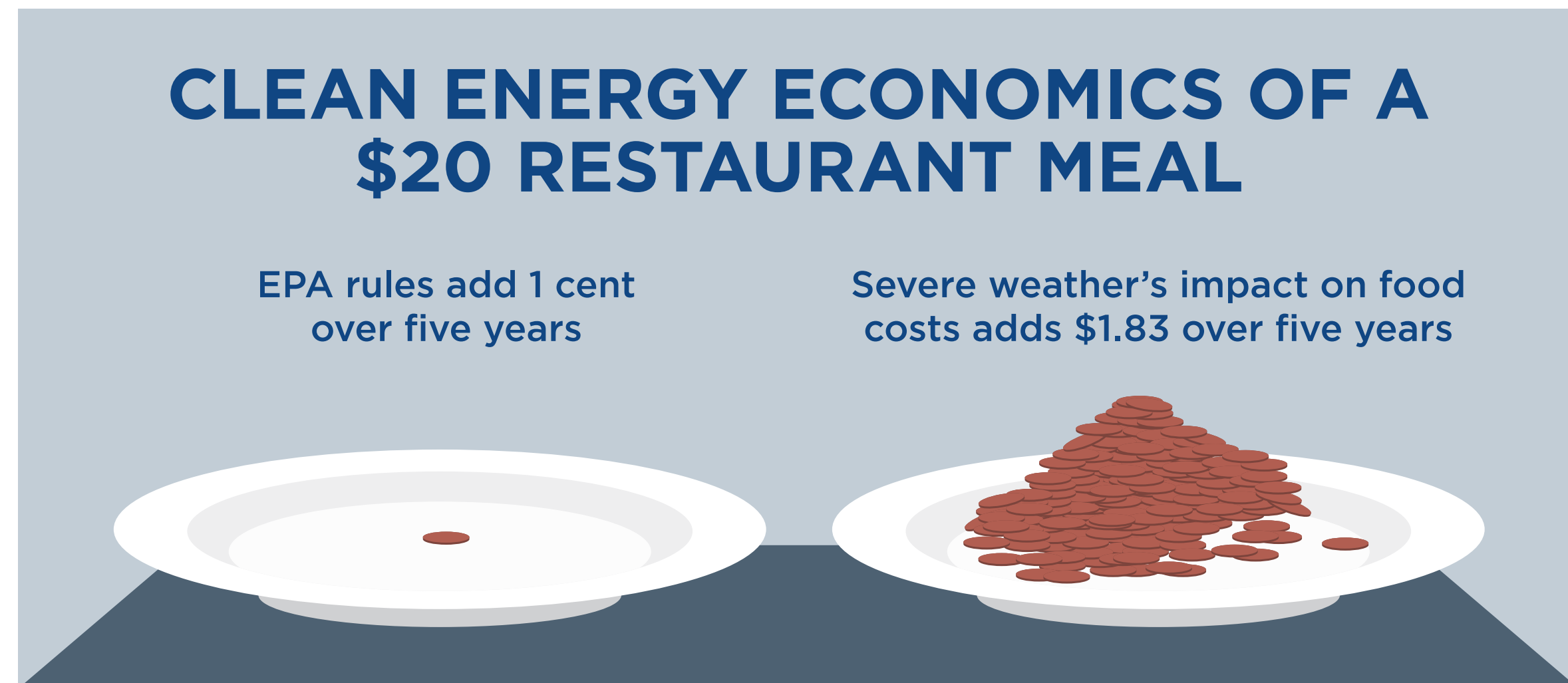
4: KEEP IT SHORT, KEEP IT SIMPLE (AND PRACTICE)

Talking live to a radio reporter? You'll get two questions and about 20 seconds. Taping a TV interview in your office? The station will use about 30 seconds of your 15-minute interview. Meeting with your Senator? You'll get about five minutes.

Reporters can't quote you if your answers are too long. Elected officials, who meet with dozens of constituents every day, won't remember your key points if they're buried.

To be successful, make your point quickly, and make it repeatedly. Extend your idea with examples. Ideally, start each interview with three points in mind; practice each point before you speak with the reporter or official; and practice referring back to your points in different ways.

Using local examples and simple comparisons can help you make your point more quickly. For example, in our climate research, we found that switching to cleaner energy would add only a penny to cost of the average restaurant meal. Meanwhile, heat, drought and severe weather could add \$1.83 to the cost of that meal over the next five years. Similarly, switching to cleaner energy would add \$4 to the cost of a \$30,000 car. Meanwhile, assembly plants are losing \$1.2 million for every hour their shut down by severe weather.



GRAPHICS FOR BUSINESS FORWARD CLIMATE STUDIES.

5: SPEAK FOR YOUR EMPLOYEES, CUSTOMERS, SUPPLIERS AND COMPETITORS

You're most effective when you cite your employees, customers, suppliers, or competitors as evidence. For example, an accountant with 50 clients has credibility on simplifying the tax code, while an accountant with 50 employees has credibility explaining the kinds of health care options they value.

Most business leaders share the name of their company when they talk with reporters, publish an op-ed, or speak out in some other way. These executives are building their company's brand.

"At ABC Insurance, we've seen rates for beach property rise by 50% over the past four years because of climate change risk. Clients are cancelling their policies, leaving themselves open to big losses."

Alternativley, you can also speak generally, without naming your company, as an expert in the industry.

"I've sold insurance for beach houses here in New Jersey for 30 years, and climate change is driving rates up by 50%. Clients are cancelling their policies, leaving themselves open to big losses."

It's time to unleash the power of **small businesses** by helping them **reach new markets.**

- Kimberly Benson,
Cange International

THE
HILL

Every product we sell overseas **helps us hire more Washington-state workers** and pay them competitive wages.

- Anil Amlani, Sonosite

PUGET SOUND
BUSINESS JOURNAL

The future of small businesses like mine goes hand in hand with the future of the U.S. trade agenda."

- Wendy Mascio, Medical Equipment

Pittsburgh Post-Gazette

Discouraging businesses from expanding to other countries is like standing in a shopkeeper's doorway and turning away **95 percent of customers.**

- Craig Shields, Graymills

CHICAGO
SUN+TIMES

Linking local companies to **international trade is a key driver of economic growth** in the Capitol Region.

- Patrick Mulvaney,
Mulvaney's B&L

THE SACRAMENTO BEE

Business abroad is going to happen anyway, the question is whether or not international business practices will be fair. **If the United States doesn't set the rules, someone else will.**

- Brenda Hall, 360 Bridge

AUSTIN
BUSINESS JOURNAL

If passage of this authority stalls, our trading partners might be inclined to negotiate their own agreements, with the **United States left on the sidelines.**

- Det Ansinn, BrickSimple

The Philadelphia Inquirer

I've seen how **exporting can powerfully transform a company**, and I want to see it do the same for others.

- Kyle Weatherly, Solaris

MILWAUKEE • WISCONSIN
JOURNAL SENTINEL

SMALL BUSINESS LEADERS ARGUE FOR NEW TRADE AGREEMENTS.

6: REFRAME QUESTIONS ABOUT “HOT BUTTON” ISSUES

The whole point of having business leaders speak out is to get beyond the partisan or hot button issues that dominate most press coverage. Your job is to focus on what a particular proposal or problem means for business, jobs, and economic growth. That’s your area of expertise. If a reporter does ask you an off-topic question, pivot back to your key points.

EXAMPLE - IMMIGRATION REFORM

A business leader can explain the economic benefit of recent bipartisan immigration reform proposals. One key benefit of these proposals relates to how much immigrants could contribute to Social Security. A reporter may respond to your point by asking about illegal drugs or gang violence.

SUGGESTED ANSWER:

“I can’t speak to that, but I do know that immigrants could contribute nearly \$300 billion in additional support for Social Security over just 10 years.”

EXAMPLE - CLEAN ENERGY

A business leader can support clean energy regulations by explaining why wind and solar prices keep dropping – and how they can help create jobs in states that have traditionally relied on imported coal, oil, and gas. A reporter may ask why the government should subsidize wind and solar over coal.

SUGGESTED ANSWER:

“Taxpayers subsidize every energy sector. In fact, we’ve spent \$1 trillion on energy subsidies since WWII, and 70 percent of that went to oil, gas, and coal. I can’t speak to the value of all the money we’ve spent on coal and oil, but I do know that wind and solar are becoming more competitive, and they present my state’s first real chance to build an energy economy.”

EXAMPLE - TARIFFS

If you’re talking with a reporter about how new steel and aluminum tariffs are raising your prices and making it harder to export your products, he may ask you about the drama over President Trump’s behavior at a recent G7 Summit.

SUGGESTED ANSWER:

“I can’t speak to that, but I do know that tariffs increased my steel costs by 25%, which is making it hard to export my goods to Europe and Asia. In those markets, the price they pay for steel prices has actually dropped.”

“

**This isn’t a Republican issue.
This isn’t a Democratic issue.
This is a business issue.**

”

– BRENDA HALL
CEO, BRIDGE360

AUSTIN
BUSINESS JOURNAL

7: ACT LIKE YOU'RE ON-THE-RECORD, EVEN WHEN YOU'RE NOT

The rules for “on” and “off” the record can vary from reporter to reporter. As a general rule, **we recommend you operate on-the-record – and pick your words accordingly.**

On-the-record means the reporter can quote you directly (by name).

Off-the-record can mean different things. It usually means the reporter can only use information if a second source verifies or shares it. Sometimes, it relates to how you are cited. For example, a reporter may refer to you indirectly (for example, as “a partner at a Cleveland VC firm”), or she may use your information without citing you at all. Some reporters consider this method of citing individuals “on background.” On-background can also mean you are willing to share research or other information with a reporter but do not want to be featured in the story.

Because reporters apply these rules differently, you need to set the terms of the conversation before the interview begins. If you do not specify “off,” you are “on.” If you specify “off,” and the reporter says nothing, you are still “on.” **If you do not want to be quoted, establish the terms under which the reporter may use the information and how it will be attributed.**



REMEMBER: YOU CAN'T TAKE SOMETHING OFF THE RECORD AFTER THE FACT.

8: PICK YOUR BATTLES – AND LET BUSINESS FORWARD HELP

A single business leader, acting alone, is unlikely to have an impact. But hundreds or thousands of business leaders, making similar arguments at the same time, are hard to ignore.

It also helps to deliver your op-ed, interview, or post when your particular issue is in play. We had a handful of opportunities to resolve the DACA/Dreamers crisis last year. Each opportunity was driven by the budget process, or some other legislative priority. Each time, immigration advocates and Business Forward worked together to deliver business support for a reasonable compromise that would protect Dreamers and respect the rule of law.

We encourage you to share your work with us, and we promise to limit our “digital actions,” surveys, and “a reporter just called” requests to moments when you can really make a difference. We won’t waste your time.

With your permission, we can also include your comments in testimony we present to Congressional committees and federal agencies.



OPEN LETTER FROM LEADERS OF AMERICAN INDUSTRY

As entrepreneurs and business leaders,
we are concerned about new developments
in immigration policy that threaten the
future of young undocumented immigrants
brought to America as children...

AUGUST 31, 2017

► BUSINESS FORWARD

7,000 BUSINESS LEADERS ARGUE
“AMERICA FIRST” IS COSTING
U.S. BUSINESSES BILLIONS IN LOST
EXPORTS, TOURIST DOLLARS,
AND FOREIGN INVESTMENT

JULY 30, 2018

► BUSINESS FORWARD

TESTIMONY ON BEHALF OF
1,000+ SMALL BUSINESS
OWNERS CONCERNED ABOUT
CLIMATE CHANGE

APRIL 25, 2017



IN THEIR OWN WORDS:
10 BUSINESS LEADERS EXPLAIN
WHY THEY ARE CALLING
FOR MAJOR CHANGES
AT AMERICA’S SCHOOLS.

JULY 24, 2018

BEST PRACTICES

OP-EDS

Op-eds make an argument about a pressing issue, usually featuring an unusual and compelling voice from the community. Most newspapers limit op-eds to 600 words.

VALUE

In deciding whether to publish your piece, editors will ask four questions. Is your issue important? Is it timely? Does it have a significant local angle? And does the author have a credible and interesting angle?

STRUCTURE

Use 8-10 short paragraphs, about 2-3 sentences each. Start with an anecdote that introduces your point of view. Explain why the issue is important right now. Introduce your business, and explain how this issue explains your business. Close with a call to action.

PITCHING

Larger papers have online tools that allow you to submit your op-ed. Others invite you to email your document. Start with the

largest newspaper in your market, or a leading outlet in your particular industry. Be sure to check whether it's published a similar piece recently. If so, move on to your second choice. When you submit an op-ed to one paper, you can't shop it to another until the first gives you an answer.

➤ RESOURCES & LINKS

[RESOURCE-MEDIA.ORG/WRITING-SLAM-DUNK-OP-ED/](https://resource-media.org/writing-slam-dunk-op-ed/)

[THEOPEDPROJECT.ORG](https://theopedproject.org)

THE MONEYBALL OF CLIMATE CHANGE

The beginning of the season is an exciting time of year for our local Lake Erie Crushers – for the players and fans, of course, but also here in the back office. Unfortunately, increasingly frequent severe weather, including hotter summers and more severe storms, is threatening the livelihood of America's favorite pas-time...

There are lots of reasons to own a baseball team, and money is only one of them. But we can't put ourselves in a position where we operate at a loss. If we don't do something to curb climate change, outdoor businesses like mine will suffer – and many will fold.

Over the past few years, a number of minor league teams like ours have discovered it's harder to sell seats in the sunnier sections of our stands.

And rainouts increasingly reduce our revenue as well. I have been a part-owner of the team for six years. The very first year, we did not have a single rainout. Last year, we had 18. Some of the games that are not rainouts still have poor weather for two or three hours before a game, causing people to stay home.

These ups and downs are really tough to manage... Severe weather is particularly damaging for a small team like mine. About 25 to 30 percent of our tickets are sold on game day. So when bad weather hits, we can't sell enough tickets to make a profit. That affects all aspects of my operation—from maintaining our turf field to paying players and staff.

Losses from rainouts spread throughout the town. When 75 workers do not get paid, they don't spend as much money in town. As a result, nearby restaurants and shops lose business, too. This is the small-town

side of the multi-billion-dollar baseball industry. I am a businessman, not a scientist, but I know we need to do something about this.

Our leaders in Washington and here in Ohio need to take serious efforts to curb climate change. One important step would be implementing policies that will reduce carbon emissions...

Haven't we learned anything from Moneyball? Playing by the old rules is threatening the profit of the game. The evidence of rapidly changing weather is all around us. Now let's use that evidence to implement a winning strategy.

Robert Roche, Partner,
Lake Erie Crushers

THE PLAIN DEALER

CLEVELAND.COM

LETTERS TO THE EDITOR

LTEs respond directly to an article or op-ed the newspaper has recently published. Try to respond in two to three days.

We recommend you use four short paragraphs, 1-2 sentences each. Don't be surprised if the newspaper edits for space.

Larger papers have online tools that allow you to submit your LTE. Others invite you to email your document.

BLOGS

In contrast to an LTE or op-eds, blogs should have an edge. To break through on websites like Medium and Huffington Post, you need to make your point in sharper terms

TPP GOOD FOR ECONOMY

Despite what some presidential candidates are saying, the Trans-Pacific Partnership would do great things for small businesses and the economy.

Our family business (W.S. Darley & Co.) sells fire pumps, fire trucks and emergency response equipment to over 100 countries every year. Trade agreements help us operate on a level playing field in certain countries where tariffs and other trade barriers would otherwise make selling very difficult.

It's not just our family company that would benefit from TPP. In 2014, exports supported 11.7 million jobs across the U.S. The lower barriers to trade that come with TPP are good for small businesses like mine, good for Wisconsin and good for U.S. jobs. With those interests in mind, I hope Congress will act to approve TPP soon.

RYAN DARLEY
Chippewa Falls

➤ RESOURCES & LINKS

RESOURCE-MEDIA.ORG/LETTERS-TO-THE-EDITOR/

RESOURCE-MEDIA.ORG/BLOCKBUSTER-BLOG-POSTS/

RADIO AND TV

Stories run from 30 seconds to 5 minutes. A typical quote in one of those stories runs about 10 seconds. Stay on message; keep it short; keep it local. Have three points; practice each point before you speak with the reporter; practice referring back to them in different ways.

BEFORE THE INTERVIEW

Consider your audience's familiarity with the issue and adapt your points accordingly. You can use shorthand on CNBC that won't work on your local newscast.

Consider the reporter's likely approach to the story. You need to connect your argument with the questions he's likely to ask. Prepare ways to pivot from the question to your key points, such as "That's why I believe..." Remember, you need to do this in about 30 seconds. Answers longer than one minute are cropped or go unused.

- Wear solid, flattering colors.
- Avoid distracting prints, ties, or scarves.

WHEN YOU ARRIVE

Confirm the details of your interview: who is interviewing you, who else may be part of the segment, the topic, and how long the segment will run. If you are doing a "stand-up" (in-person quick interview not in studio), be sure you are comfortable with the set up before the camera starts rolling.

WHEN YOU'RE ON

In pre-taped interviews, look at the reporter. In remote (live) interviews, look at the camera. When discussing contentious issues, be a "happy warrior": Smile or have a pleasant look on your face while you listen to the reporter's questions or to other guests' comments.

▶ RESOURCES & LINKS

[RESOURCE-MEDIA.ORG/BUILDING-A-MESSAGE/](https://resource-media.org/building-a-message/)

SOCIAL MEDIA

Capitalize on moments. Use key events to build your audience and your brand as a business expert. Remain active. Be authentic: avoid sounding like a press release. Avoid sarcasm. Prepare for people to disagree with you. Ignore “trolls” who post absurd or offensive replies to your content.

FACEBOOK

Personal stories, sharing content

Fewer than 90 characters

Imagery = #1

Video with subtitles, if possible

TWITTER

Promoting external content, engaging with customers

Okay to post same content multiple times

Retweets are integral

LINKEDIN

Business-related content

Medium length

Headline quality determines success

MEDIUM

Longer form content

Promote externally in addition to organic reach

> RESOURCES & LINKS

[RESOURCE-MEDIA.ORG/MASTERING-SOCIAL-MEDIA/](https://resource-media.org/mastering-social-media/)

TALKING TO YOUR ELECTED OFFICIALS

GENERAL

A small number of calls (from informed constituents) can have a bigger impact than you might think. Regular communication, over time, builds trust. If you weigh in regularly on tax and trade, staffers are more likely to respond to your call and share your advice with their boss. Be sure to focus on your elected officials – the ones who represent where you live, where you work, or your employees. In Congress, Representatives of other districts are likely to ignore you out of deference to your Representative.

LETTERS

Use email. Regular mail to Congress is re-routed, sorted, and x-rayed. This can add weeks to delivery. Most offices have email forms accessible from the “contact” tab on the lawmaker’s official website. Include the legislation or issue in your subject line – with a “yes” or “no” to make your opinion clear (e.g., “NO on steel tariffs” or “YES on DACA”).

Keep your message to three paragraphs. Use a fact-based approach. Cite local examples, if you have them. Identify yourself as a constituent and business leader in your first paragraph.

CALLS

Identify yourself as a constituent, identify the topic/bill you want to discuss, and be clear about your position.

Ask for the Legislative Assistant covering your issue. If they refer you to a Constituent Liaison, that’s okay.

If you have data about the bill or your business, describe it (e.g., “These new tariffs raised the price of steel by 25%. This new cost wiped out 40% of my profit this month.”).

Ask for the name and email of the staffer responsible for that issue, then send him or her a follow-up email with the data.

REQUEST A MEETING, OFFER A TOUR

This is one of the best ways to break through with a business government office.

Ask for the Legislative Assistant covering your issue. Request a meeting with the official. If dealing with a Member of Congress, request a meeting back home, during in-district work periods. If appropriate, invite your elected official to visit your place of business.

➤ RESOURCES & LINKS

FIND YOUR REPRESENTATIVES
[HOUSE.GOV/REPRESENTATIVES](https://www.house.gov/representatives)

RESEARCH THEIR BIOS, COMMITTEE ASSIGNMENTS
[CONGRESS.GOV](https://www.congress.gov)

RESEARCH THEIR VOTING RECORD
[SENATE.GOV/LEGISLATIVE/VOTES.HTM](https://www.senate.gov/legislative/votes.htm)

SEARCH FOR SPONSORED BILLS
[GOVTRACK.US/CONGRESS/BILLS](https://www.govtrack.us/congress/bills)

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