A summary of the process

The outline below is specific to encouraging National Societies to have a stronger engagement with cash transfer programming, but it can readily be adapted to other issues.

Situation analysis	In step 1 we consider the broader context, internal and external. We identify key stakeholders and clarify and understand the terrain in which the advocacy objective is to be addressed.
Defining the purpose of our intervention	Step 2 tries to clarify the exact result we are trying to achieve, initially by trying to understand what barriers sit between our current situation and a stronger engagement with cash transfer programming. These barriers can be human, institutional, legal, or take other forms. Identifying the barriers to change brings focus to our advocacy. At this stage we may also ask the question: is there a window of opportunity? Or not?
Identifying the target audience	In step 3 we identify the critical decision-makers, leaders and influencers in the National Society since they are likely to be linked to, or have influence over the barriers to change. They may be representatives from governance, management or influential external personalities. We need to be able to access their time and attention.
Selecting the advocates	Step 4 asks the question – who will undertake the actual process of advocacy? The individual must be able to gain and hold the attention of the target audience. He/she must bring sufficient personal technical experience and confidence to be persuasive, and to be able to respond to unplanned questions. Finding a person who meets both these criteria can be challenging. If this is the case you may want to look into brining two advocates on board.
Developing the approach	By step 5 we have a hypothesis: we know the barriers to change we want to overcome, the people we need to influence to achieve that, and those who will do the influencing. We now need to consider what approach will be most effective. We can look at fears and concerns; focus on the positive aspects; or the strong alignment with policy and mandate. The situation analysis will help us to select the right approach.
Finding and selecting appropriate evidence	In step 6, we will need to identify appropriate sources of evidence. The evidence should ideally be targeted to the context, i.e. the situation, target audience and key issues identified as barriers to change. Finding appropriate evidence can be challenging.
Planning the meeting	Step 7 we will need to do some preliminary work prior to issuing a formal invitation to the meeting. The title and focus of the meeting will need to be chosen carefully. Time will need to be set-aside in the agendas of the participants in advance. It may be a challenge to get agreement for a longer meeting or workshop. Fitting the materials into a shorter meeting could be a challenge. The broad approach for the meeting needs to be considered in the light of the culture and the attendees. Should it be formal? Informal? Participatory? What action points are we hoping to get agreement on?
Holding the meeting	Step 8 is to ensure a relaxed and friendly atmosphere, an appropriate location, and adequate refreshments. Ensure that the chair of the meeting is well chosen.
Follow-up	Step 9 deals with what needs doing post-meeting. It is important to write to thank the participants for their time and to remind them about any action points that were agreed upon during the meeting. It may be necessary to arrange follow-up meetings between technical specialists or management. The process of change triggered by the meeting should be monitored. In addition, feedback on the value of this guidance would also be welcome, along with suggestions for its improvement.

Timelines and critical path