

# CONDUCTING THE TOUR

**GREET GUESTS AS THEY ARRIVE.** Hand out name badges and make proper introductions. Have umbrellas at the ready in the event of rain.

**OFFER LIGHT REFRESHMENTS (Optional)**

**CONDUCT A SAFETY BRIEFING** to inform visitors about any hazards they may encounter, and reassure them that you will provide any equipment when needed.

**WALK THE LAWMAKER THROUGH THE DAILY OPERATIONS OF YOUR FACILITY** to provide a deeper understanding of what your company does and how it is done. This is an ideal time to emphasize any current government policies that dictate certain processes or how they would be affected by proposed policies.



**LET YOUR VISITORS PARTICIPATE** and engage with your staff and equipment during the tour. This may take the form of providing a chance to address your workforce, officiate a ribbon-cutting, examine your fleet, climb into a bobtail truck, witness a bobtail refill, etc. Engagement makes for a more memorable visit.

**BE SURE TO NATURALLY INCLUDE YOUR TALKING POINTS AT APPROPRIATE MOMENTS DURING THE TOUR.** Prepare specific answers to expected questions, especially those about the local impact your company has in the elected official's district, and work in specific success stories and details on the jobs you create, services you provide, and impact you have had on the community.

# FOLLOWING UP

*A facility tour enhances the mutual understanding between your company, the industry, and elected officials. To make certain that your guests remember their visit, follow-up efforts are important.*

**SEND THANK-YOU NOTES TO GUESTS** (handwritten preferred) thanking your guests for their time. Reiterate any key issues discussed during the tour and extend an invitation to return at any time. If your company hosts an annual event or outing, such as a picnic, consider extending an invitation. Ask the elected officials and their staff to call you or PGANE if they ever have a question about propane.

**THANK YOUR STAFF** for sharing their time and expertise to make the tour a success.

**SEND PHOTOS FROM THE TOUR TO THE ELECTED OFFICIAL'S OFFICE,** with your permission for them to be used in constituent newsletters and on the legislator's website, social media, and office wall.



**TELL PGANE ABOUT THE TOUR.** Let PGANE know how the tour went, so your experience can help assist other companies. Please include any news, follow-up questions and photos.

**FORWARD ANY PRESS COVERAGE** the tour generated to the elected official's office, from your company newsletter or through the media.

**USE SOCIAL MEDIA TO HIGHLIGHT THE TOUR.** Share photos, details, etc., on company social media platforms, and be sure to tag your guests.

**CONTINUE TO COMMUNICATE WITH THE LAWMAKER'S OFFICE POST-EVENT.** Offer substantive policy advice and track the decisions they make on future legislation or policies which will affect your business. Be sure to thank them for any favorable position they may take.



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# FACILITY TOUR GUIDE:

## Make Propane Part of New England's Energy Future by Showcasing Your Business to Elected Officials

*Conducting propane facility visits is a great way to build relationships between your company and lawmakers, and increase support for a pro-propane agenda. Facility tours educate lawmakers on propane's importance to the economy and our way of life. These visits can also provide positive press opportunities for your company. This guide will help you plan, prepare for, and conduct a successful facility tour.*

# FACILITY TOUR CHECKLIST

*Facility tours provide the best way to showcase your business and the propane industry!*

**SETTING UP A TOUR**

- ☐ Identify your local legislators
- ☐ Send an invitation
- ☐ Track and confirm RSVP's; follow up as needed
- ☐ Coordinate length of event with your guests
- ☐ Distribute memo of visit to facility employees

**MEDIA PLANNING (Optional)**

- ☐ Clear media participation/attendance with your guests
- ☐ Draft a media advisory or notify local media
- ☐ Prepare area at facility for media
- ☐ Prepare a message from your company's owner/CEO

**ORGANIZING A TOUR**

- ☐ Organize an internal planning group, if needed
- ☐ Research the lawmaker's background
- ☐ Decide who will meet with the guest
- ☐ Craft introduction and tour scripts
- ☐ Establish look and feel of welcome area
- ☐ Designate a room for guests to speak to your staff
- ☐ Create name badges for guests and staff
- ☐ Determine required safety equipment
- ☐ Hire/designate photographer
- ☐ Prepare a company information package
- ☐ Write out questions for the lawmaker

**PREPARATION OF DISPLAYS/LITERATURE/MATERIAL**

- ☐ Determine product display, if applicable
- ☐ Gather company literature and background materials
- ☐ Display PGANE/NPGA materials
- ☐ Review the PGANE folder
- ☐ Provide list of attendees' names and companies (or business cards)

**PREPARING FOR ARRIVAL**

- ☐ Designate a note-taker
- ☐ Provide light refreshments, if desired
- ☐ Welcome guests on arrival
- ☐ Discuss the PGANE and company folders
- ☐ Let guests talk to your staff

**CONDUCTING A TOUR**

- ☐ Provide a safety briefing
- ☐ Distribute required safety equipment
- ☐ Walk through your facility's daily operations
- ☐ Let your visitors be active participants
- ☐ Verbalize your prepared talking points during the tour
- ☐ Hold an employee meeting at the end of the tour, if possible

**FOLLOWING UP AFTER A TOUR**

- ☐ Send thank-you notes to guests
- ☐ Thank your staff
- ☐ Send photos to elected official's office
- ☐ Email PGANE a summary of the meeting and photos
- ☐ Use social media to highlight the tour
- ☐ Continue to communicate with the lawmaker's office post-event





# SETTING UP A TOUR

**DECIDE WHO TO INVITE:** a candidate, a member of the Legislature, legislative staff, or a local official? If you have never hosted a tour, consider starting with a local town official, federal staff person, or state legislator. A staff-level visit can be just as important as a visit from the elected official in many cases.

**SEND AN INVITATION** explaining who you are and what you would like to showcase. Include directions to your facility, as well as a requested amount of time. It is best to be flexible and provide multiple dates. Once a date is set, be prepared for last-minute schedule changes. The ideal time to request a federal tour is during a recess period, or on a Monday or Friday, when members of Congress are often in their states/districts. Recess periods generally correlate with the following holidays and seasons:

- *Martin Luther King, Jr. Day (mid-January)*
- *President's Day (mid-February)*
- *Easter/Passover (March or April)*
- *Memorial Day (late May)*
- *Independence Day (July 4)*
- *Summer (August – week after Labor Day)*



- *Rosh Hashanah (late September or early October)*
- *Yom Kippur (10 days after Rosh Hashanah)*
- *Columbus Day (early October)*
- *Veterans Day (early November)*
- *Thanksgiving*
- *Christmas/New Year's (late December–early January)*

**TRACK AND CONFIRM RSVP'S AND FOLLOW UP AS NECESSARY.** Confirm with your official's scheduler that your invitation has been received, and then follow up to confirm a date and time. Don't be discouraged if a visit is not scheduled immediately. Invite the official to drop by for a tour and a cup of coffee the next time he or she passes through town or has some free time between campaign stops. Leave the invitation date open-ended.

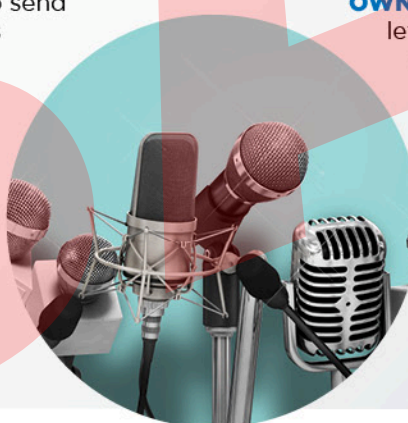
**COORDINATE LENGTH OF EVENT WITH ELECTED OFFICIAL'S STAFF.** Determine how much time the official has for the visit. Tours generally last 30-60 minutes. Also, suggest proper attire (including shoes) for the tour.

**DISTRIBUTE MEMO ANNOUNCING THE VISIT TO FACILITY EMPLOYEES** and encourage them to attend.

# MEDIA PLANNING (Optional)

**CLEAR MEDIA PARTICIPATION/ATTENDANCE WITH ELECTED OFFICIAL'S OFFICE.** Media presence during a visit can raise your company's profile, but can also dampen some of the informality and candidness between employees and the visiting official. If the official's office approves media attendance, contact your local media outlets, including newspapers, news, and radio stations. Plan to send your own report and photos to these sources after the event.

**DRAFT A MEDIA ADVISORY** containing the date, time, location, parking accommodations and lighting requirements, if any. Note if the tour itself will be open for press coverage and if the official will take questions afterwards. Have the official's press office approve the media advisory and then send it, along with a press kit and your company's information, to everyone on your company's press list.



**PREPARE AREA AT FACILITY FOR MEDIA.** Arrange for an area outside your facility (preferably in front of your company's signage or logo) for presentations, ribbon-cuttings (if appropriate), and discussions.

**PREPARE A MESSAGE FROM YOUR COMPANY'S OWNER/CEO** in the form of an "op-ed" or letter to the editor on an issue related to the official's visit, and submit it to local and national newspapers and weeklies. You can also reach out to local TV and radio stations requesting an interview on the subject.

# ORGANIZING THE TOUR

**PUT TOGETHER A PLANNING GROUP,** if necessary, that will be responsible for organizing the logistics of the facility tour.

**DECIDE WHO WILL MEET WITH THE LEGISLATOR.** Do not be concerned with an elected official's political party affiliation. The facility tour is designed to educate and develop a good rapport with public officials who may influence the future of your company and our industry.

**ASSIGN AN EMPLOYEE TO TAKE NOTES ON ANY DISCUSSION.**

**CRAFT LAWMAKER INTRODUCTION,** decide who will provide remarks and the topics to be covered.

**ESTABLISH LOOK AND FEEL OF WELCOME AREA:** consider signage, displays, decorations, flowers.

**DETERMINE A ROOM FOR LEGISLATORS/OTHER GUESTS TO ADDRESS YOUR STAFF,** and consider the need for a microphone, podium and/or refreshments.

**CREATE NAME BADGES FOR GUESTS AND STAFF.** Relationships are built on a first-name basis!

**DETERMINE REQUIRED SAFETY EQUIPMENT** for the tour and draft your safety briefing. Remember to emphasize that safety is the industry's number one priority. Make sure to have enough safety equipment for everyone who will be part of the tour.



**CRAFT TOUR SCRIPT.** Be flexible; let the tour flow naturally and use the script more as a guide rather than a precise playbook.

**DESIGNATE A PHOTOGRAPHER.** Pictures say a thousand words! Ask an employee to take pictures of the tour. Photos are an excellent way to publicize the event and make the event memorable for the official.

**PREPARE AN INFORMATION PACKAGE ABOUT YOUR COMPANY AND ITS SERVICES.** Tell your company's story and highlight its accomplishments, especially in the local community, including any charities or community events you support. Also include data on how many jobs your company creates, benefits to the local economy, and the quality of life it provides.

**RESEARCH** your guest's biographical, political, business, social, educational, and legislative background and voting record to identify areas of common interests, by reviewing their legislative website, Facebook page, Twitter account, or other social media pages or posts. Relate to your guest on a personal level to break the ice before diving into business conversation. Check with PGANE for any materials or information they may have on your guest.

**WRITE OUT QUESTIONS FOR THE LAWMAKER,** including ones concerning policies and legislation. If questions are not addressed during the tour, you can hand off written questions to the elected official's staff, or forward them to PGANE for follow up.

# PREPARING DISPLAYS/LITERATURE/MATERIAL

**DETERMINE PRODUCT DISPLAY, IF APPLICABLE.** Showrooms are great venues to promote both your company and the industry as a whole.

**GATHER COMPANY LITERATURE AND BACKGROUND MATERIALS** including the company's history, as well as any philanthropic efforts, employee team news, etc.



**PROVIDE PGANE FOLDERS AND MATERIALS,** which can also serve as reference material should questions arise and as a reminder of your commitment to the environment. Familiarize yourself with the materials and concentrate on areas of interest to the lawmaker. Provide a company folder about your business or include your business brochures within the PGANE folder and provide copies to both elected officials and their staff.

**PROVIDE A LIST OF ATTENDEES' NAMES OR DISTRIBUTE BUSINESS CARDS TO ALL VISITORS.**

