

+

One more Key
Principle & Your
Homework...





#5: Be prepared



Hi Lauren - In putting together final preparations for tomorrow's meeting with your team, may I give you a call today to discuss logistics ahead?

A couple of questions that I was hoping you could answer:

- When we arrive today, should we ask for one of you, or someone else?

- Is the meeting room accessible before 4pm? We have an hour set aside, and if possible, I'd like to set up in the room before everyone arrives to save a bit of time for everyone. (*I'm showing the Pine Executive conference room, 2nd floor in the calendar invite.*)

- What is the room arrangement for the meeting? i.e. big conference room with a long table, smaller conference room with round table

- Do you have a projector available, or does the room have a large flat screen? (*Or neither... :-)*)

- We use Macbooks. Does the projector/flat screen require specific adapters that you might now have available?

- Will we have access to wifi-based Internet? For security purposes with a few other banks, we've been required to request a user name and password to a local network ahead of time from IT.

In case you need to provide to your building security team, here are the Blend attendees planned:

- Nima Ghamsari, CEO
- Scott Sambucci, VP Customer Success
- Pranay Kapadia, VP Product Development (possible, not confirmed)

Many thanks for your help and kindly let me know if Shannon or I can give you a call later today.

-Scott Sambucci

-----Original Message-----

From: Scott Sambucci [scott@blendlabs.com]

Sent: Friday, May 01, 2015 07:34 PM Pacific Standard Time

To: Herold, Matt; Tom, Yvonne

Subject: Re: Meeting

Hi Matt & Yvonne - Thanks you soooo much for the help today. The meeting went really smoothly and would have not without your help.

I really appreciate the help.

@Yvonne - Now you have a standard by which to hold all of your technology partners when it comes to meeting preparation. :-)

-Scott

From: "Tom, Yvonne" <Ytom@firstrepublic.com>

Date: May 2, 2015 at 8:15:35 AM PDT

To: "Scott Sambucci" <scott@blendlabs.com>

Subject: RE: Meeting

Yes. I shall remember your careful preparations always :)

Have a great weekend!

Yvonne Tom

Executive Assistant to Mike Selfridge, COO

Instant

CREDIT CHECKS

Initiated directly
through mobile app





IT Colleague of the Month


Handwritten notes on a whiteboard, including a diagram with a horizontal line and several small boxes or labels.



The Wi-Fi network "FHRGuests" requires a WPA2 password.

Password:

- Show password
- Remember this network

 Invalid password.



Cancel

Join

FHRGuests

loanDepot756@

124 main street

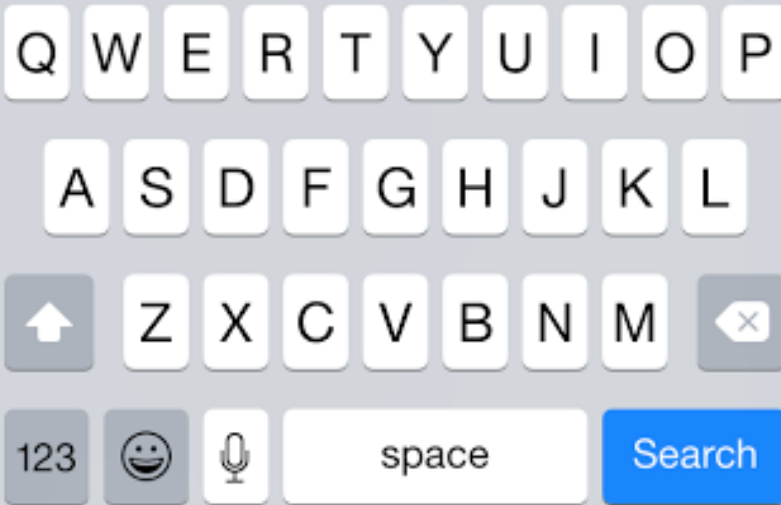
Cancel

124 Main Street
Woodland, CA

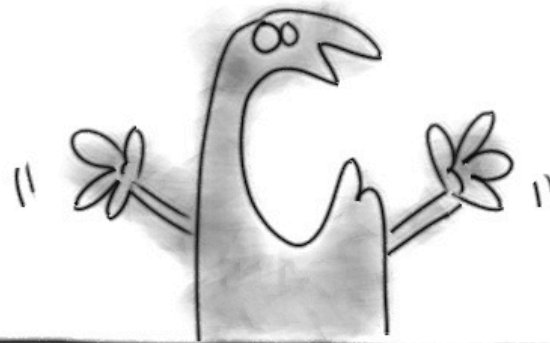
124 Main Street
San Francisco, CA


124 Main Street
Winters, CA

124 Main Street
Pleasanton, CA



Now What?!!





#1: Find The Big Demo Checklist on the Member Site

The Big Demo Checklist

You've landed the "Big Demo" with your next customer. Use this checklist for preparing and executing on your meeting.

PART I: Pre-Demo

1 week before:

- Complete a "pre-call" one (1) week before the meeting with Product Champion.
- Verify attendees, roles, and identify any additional important people that should attend but either have not yet been invited or have not accepted.
- Verify with admin assistant or Product Champion that the selected web-sharing/screen-sharing software is admissible with firewalls.

#2: Listen to the Startup Selling Podcast interview with Peter Cohan



Startup Selling Podcast Ep. 21: Product Demos the Right Way, & Avoiding the "IKEA Demo:" An Interview with Peter Cohan

The Startup Selling Podcast is brought to you by SalesQualia. If you're a startup looking to Find Customers, Grow Revenue and Build Your Sales Process, check out the Startup Selling Program. In this episode, I interview Peter Cohan, most known for his "GREAT DEMO!" system and training – teaching software companies the RIGHT way to [...]



#3: Register for Tuesday
Training 2 & 3:



**"GREAT DEMO! Workshop with
Peter Cohan | Startup
Selling Members Only"**

[https://attendee.gotowebinar.com/register/
7075342305021207042](https://attendee.gotowebinar.com/register/7075342305021207042)