

The Startup Selling Onsite meeting checklist - Set yourself up for the perfect meeting [Startup Selling Checklist]

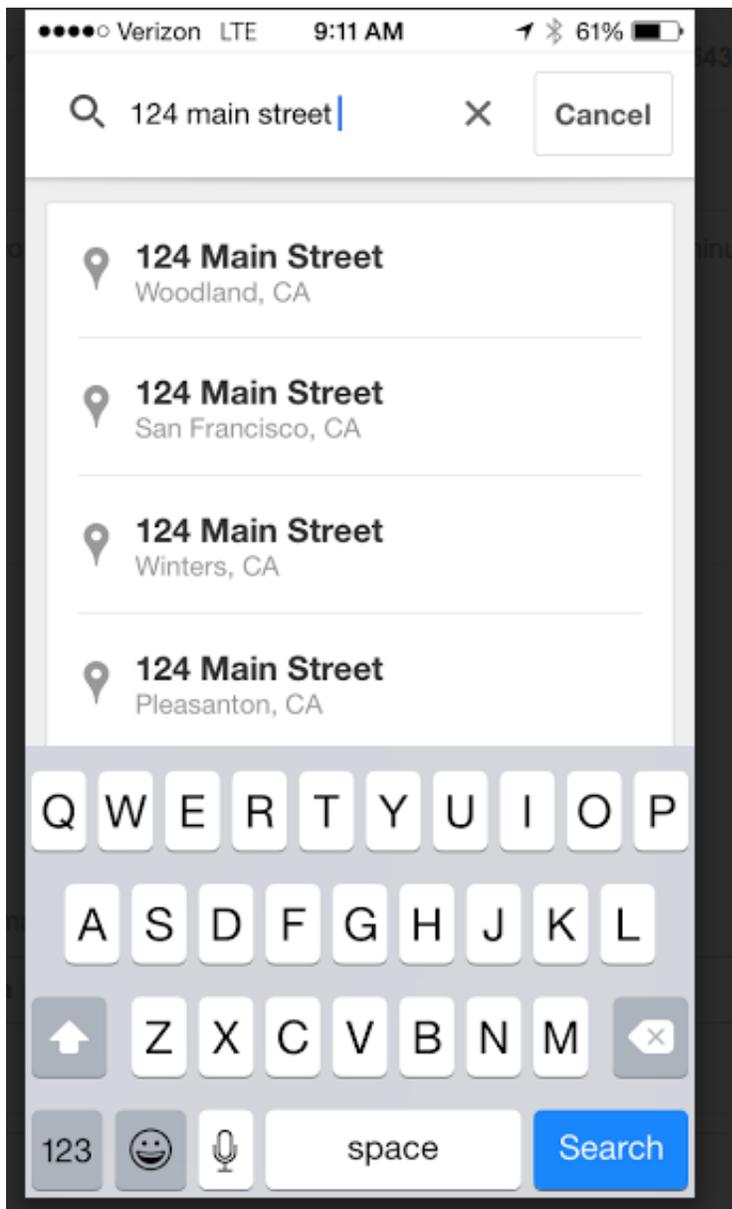


The Startup Selling Onsite Meeting Prep Checklist

Admin Asst Checklist:

1. Address, building , and location of the entry way

- Confirm the street address and ask for driving directions. Here's why - relying solely on your iPhone maps application could very well bring you to the wrong address and the wrong city altogether! When you arrive at a new city and begin typing the street address into your phone, maps applications will then auto-fill and auto-populate addresses for you. Many, many times I've had the SAME EXACT ADDRESS appear on my phone across two or three cities in the region I'm visiting. If you're not careful or don't know, you could end up driving to the wrong address in the wrong city. Getting driving directions will give you a sense of where you need to be headed from the airport.
- Particularly in large city downtowns, a company may have multiple buildings on several nearby street blocks.
- Additionally, the building entryway may not be located on the same side of the building address. For example, you could be visiting a company in Manhattan with a "Park Avenue" building address, but the main entry way for the building could be on 46th street or 47th street. It makes a big difference when you know exactly where to go instead of hunting around for the main entrance to the building, wasting time and getting frustrated.



2. Hotels Recommendations

Ask the administrative assistant for two or three hotel recommendations for visiting the office. These hotels may very well have extra amenities for hotel guests visiting the company you're visiting. A few examples:

- Discounted booking rates, free breakfast, room upgrades
- Free wifi (could save you \$15-20/day)
- Free/Dedicated shuttle service to the company you're visiting

3. Parking Recommendations

If you are driving, ask for parking recommendations. Why?

- You can set your GPS to the exact location and not stress about where to park.
- Discounted or free parking with validation (could save you \$50 in places like NYC, Los Angeles, and Chicago)
- Access to the employee garage so you don't have to deal with a public parking garage at all.

4. Point of Contact

- Confirm who to ask for when you arrive.
- Often you'll need to check in with a security guard (or battalion :-).
- Get your POC's mobile number and get permission to call or text them as you are arriving.
- Why? When you arrive, you want to have a specific person that the security guard will call to announce your arrival. Depending on the building security, that person might even need to come down to the lobby and accompany you upstairs. This alone can be a 20-30 minute process.
- The security guard is going to call the desk phone for your POC. Chances are your POC will not be at their desk. If the person is an administrative assistant, they are constantly on the move. If the POC is an executive, they are usually in meetings or working with their teams.
- Pre-announcing your arrival primes them that you are 1) ontime, 2) gives them a chance to wrap up whatever they working on, 3) adjust who will come down to security to retrieve you, 4) remind them that they have a meeting with you. (Yes, this happens too...)

5. Provide names & titles of your team.

When you check in at security, the security guard will look up your name on the manifest. If someone isn't on the list, that will cause delays because.

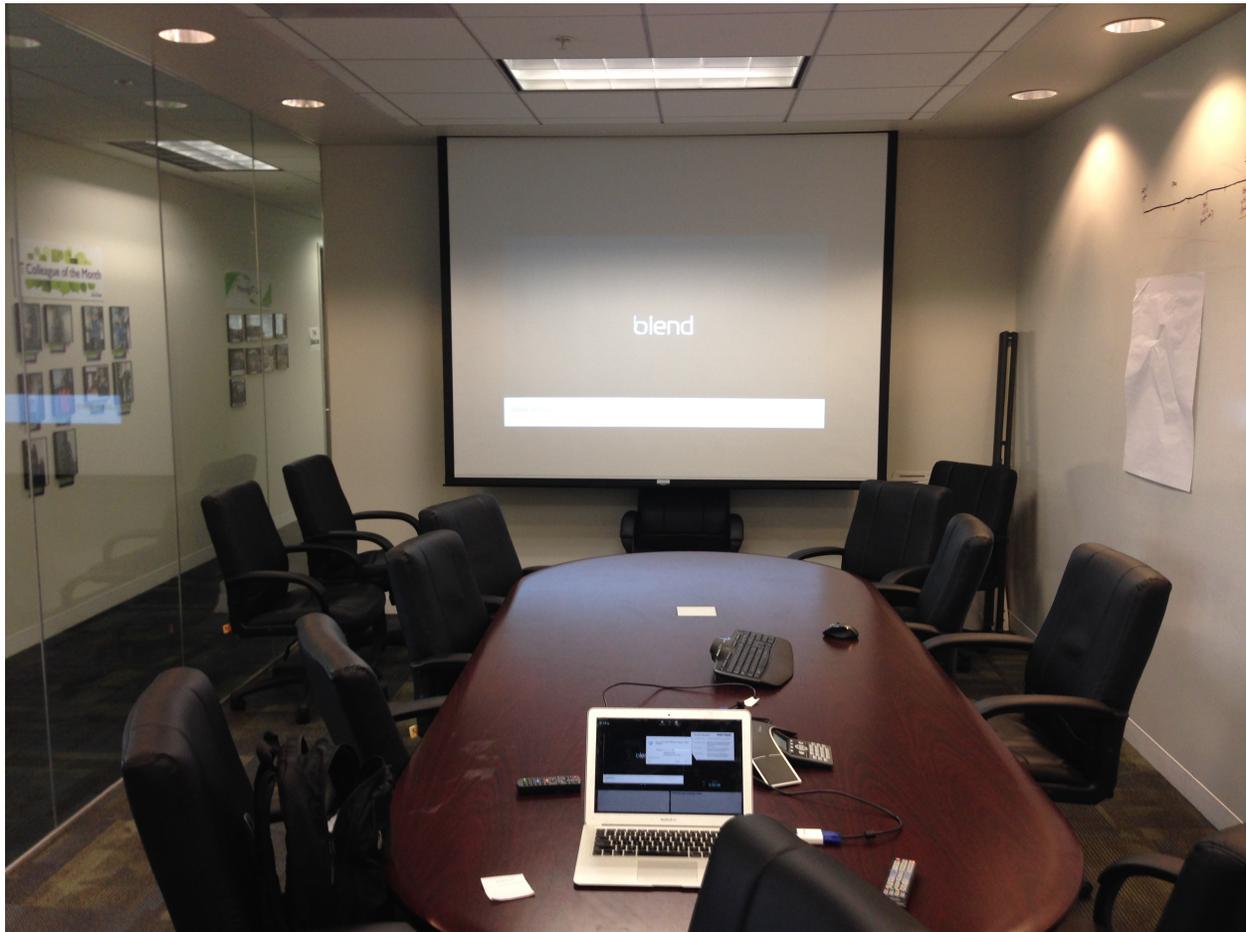
6. Room Availability

Say your meeting is scheduled to go from 3:00pm-4:00pm. Find out ahead of time if the room is open and available for set up 30 minutes before the meeting. If the room is showing as open, as the admin assistant to book the 30 minutes prior to your meeting so that you have access.

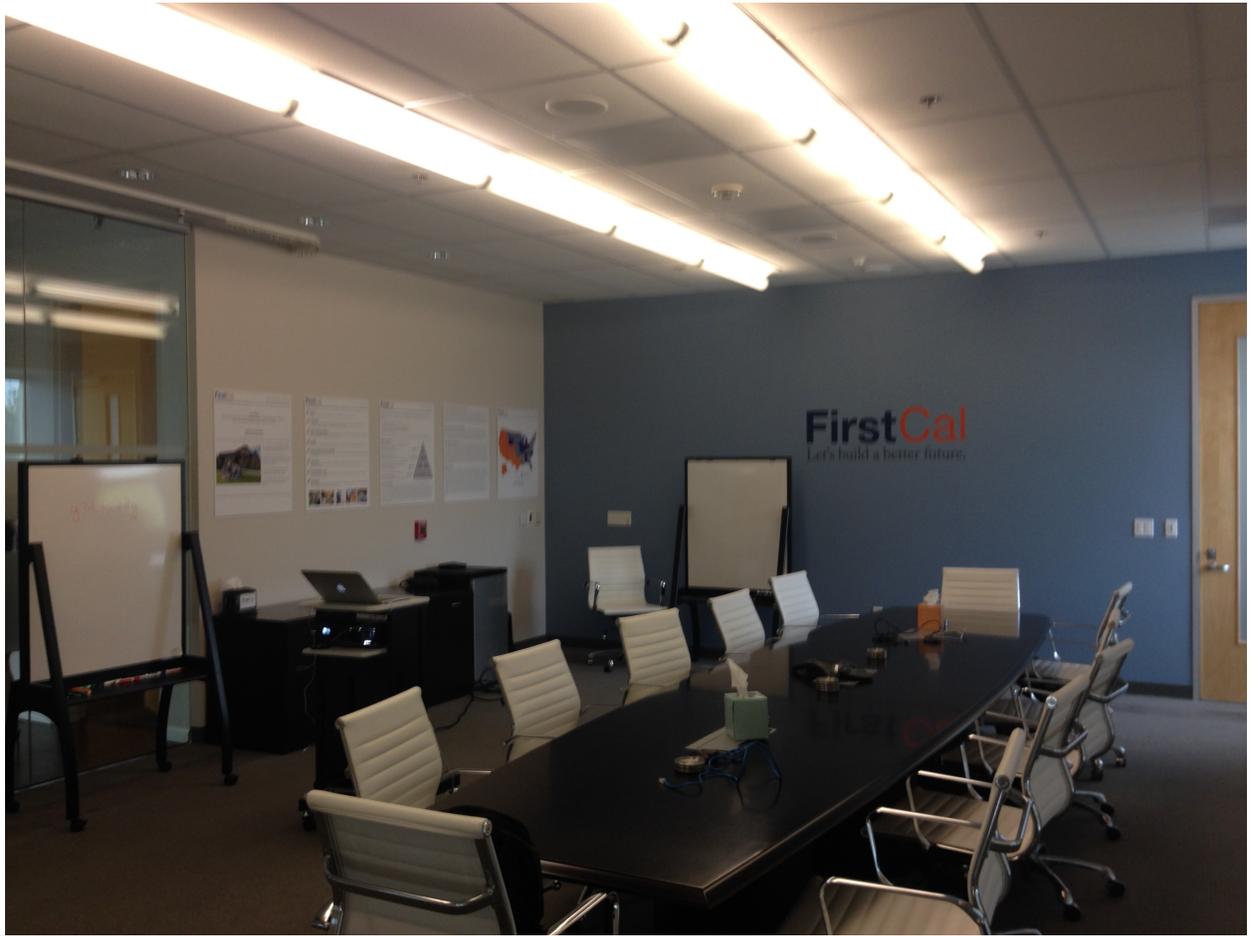
What happens if there's a meeting from 2-3pm with a bunch of top executives from your company in the room, and their meeting goes long? Now you're standing outside of the room trying to make small talk with the people arriving for your meeting, then whenever the room clears, you need to setup your presentation and the AV equipment isn't working or your can't get online. Now you look disorganized and are quickly burning the valuable time of the people you're there to meet.

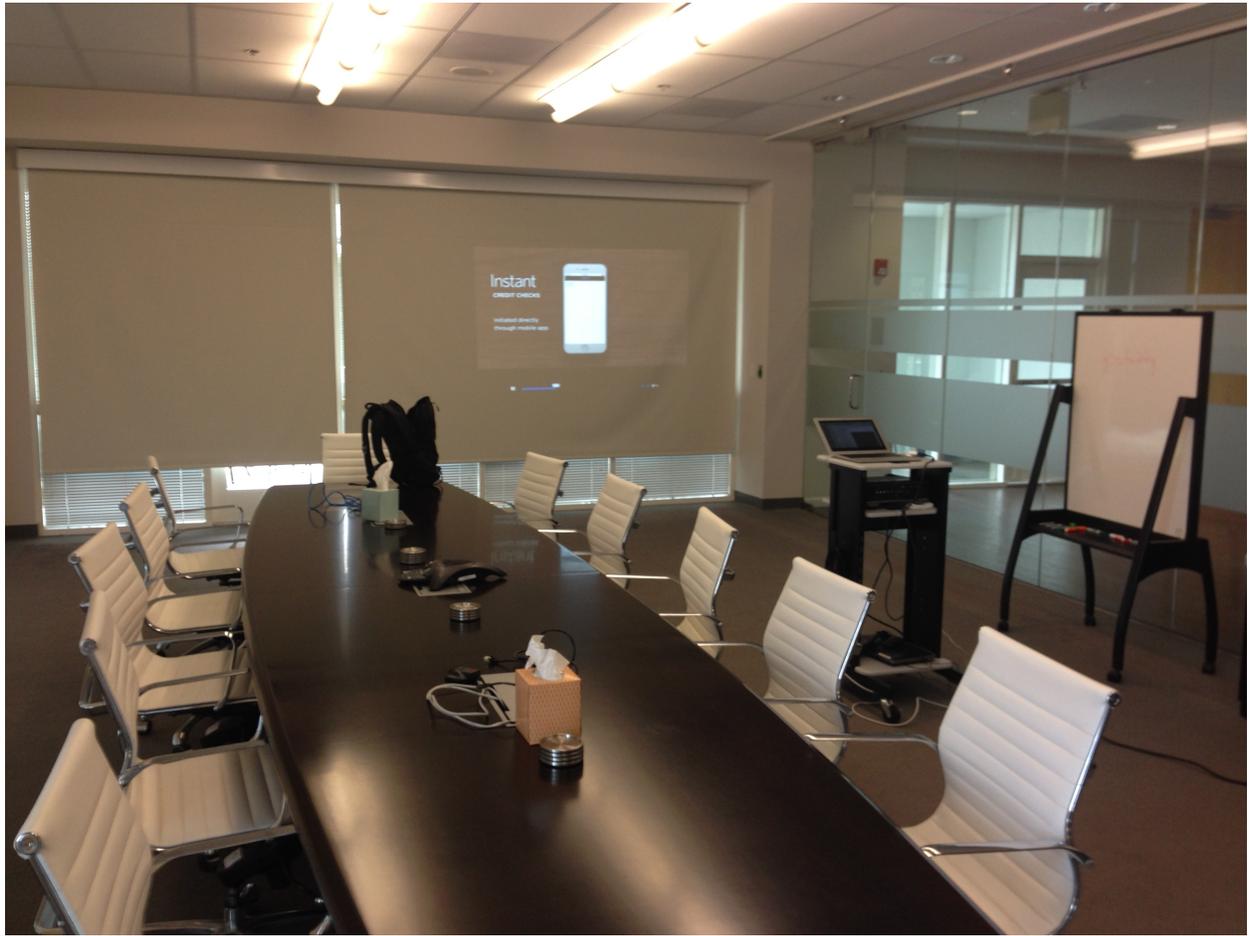
7. What is the room arrangement for the meeting?

- i.e. big conference room with a long table, smaller conference room with round table, meeting in someone's office
- Are there
- This matters because you want to have a feel for the environment.









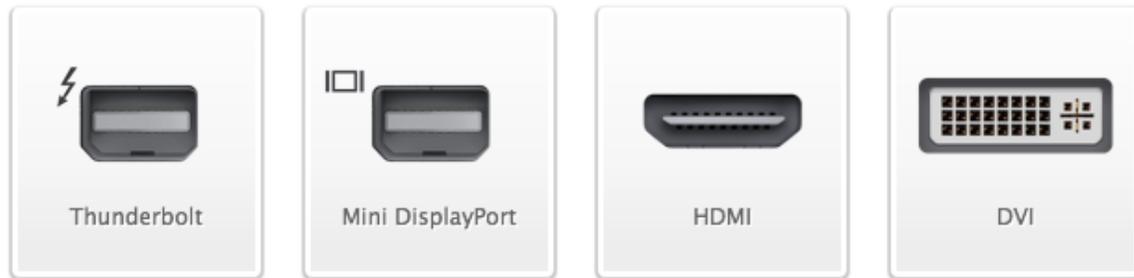


8. Do you have a projector available, or does the room have a large flat screen? (Or neither... :-)

- Also ask about black out shades in the room. Most projectors and presentation rooms were previously just plain old conference meeting rooms that the company converted into their “presentation room.”
- This means that sunlight might be glaring through the window and curtains directly onto the projector screen, making demo completely unseeable.
- Even if there’s a flat screen, there might be a reflection.
- Share what you need to achieve in the meeting with the admin assistant and ask for recommendations and verification that they room reserved is the right room for a presentation. It seems that in at least half of the meetings I have, when I ask about projection equipment, the admin assistant says - “Oh, you need to show software on a screen? Hmmm.... that room doesn’t have any equipment. Let me find another one for you.” Seriously.

9. We use Macbooks.

- Does the projector/flat screen require specific adapters that you might now have available?
- Regardless of the answer to this question, bring all possible adapters with you



10. How will you access the Internet?

- For security purposes, company IT departments require a dedicated user name and password for Internet access.
- You definitely don't want to show up trying to figure out who can give you approval. What if an IT ticket needs to be submitted? It could take a day+ for something as simple as wifi access.
- If the Wifi or Internet is publicly available, it'll 99.9% require a password. Make sure you have the password and have someone from the IT team or the administrative assistant stand there with you while you login to make sure the password work.
- Then test all of the websites you plan to access to be sure that you can access them because...

Paragraph



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

Password:

- Show password
- Remember this network

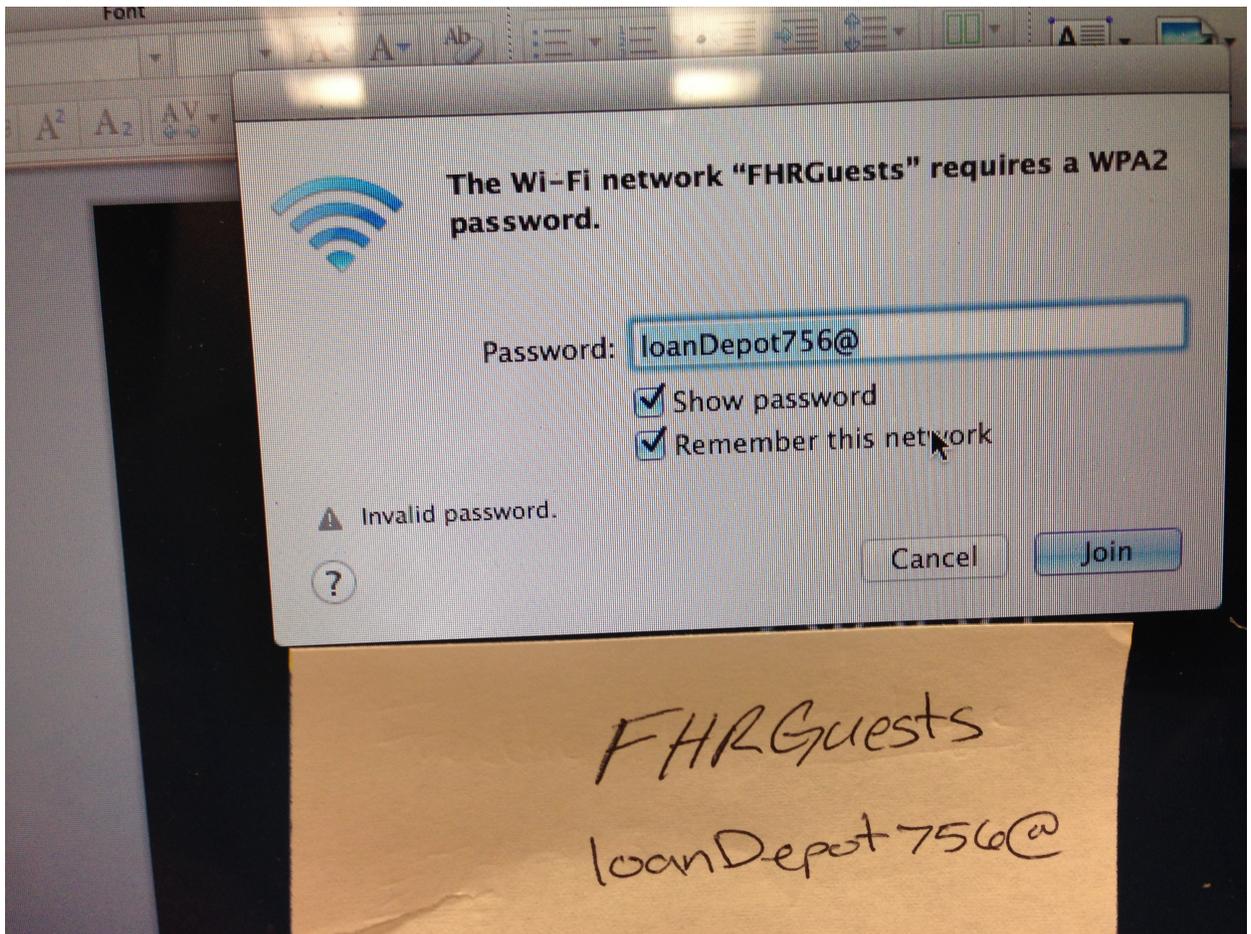
 Invalid password.



Cancel

Join

riend



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



Password: loanDepot756@

- Show password
- Remember this network

Invalid password.



Cancel

Join

FHRGuests
loanDepot756@

Paragraph



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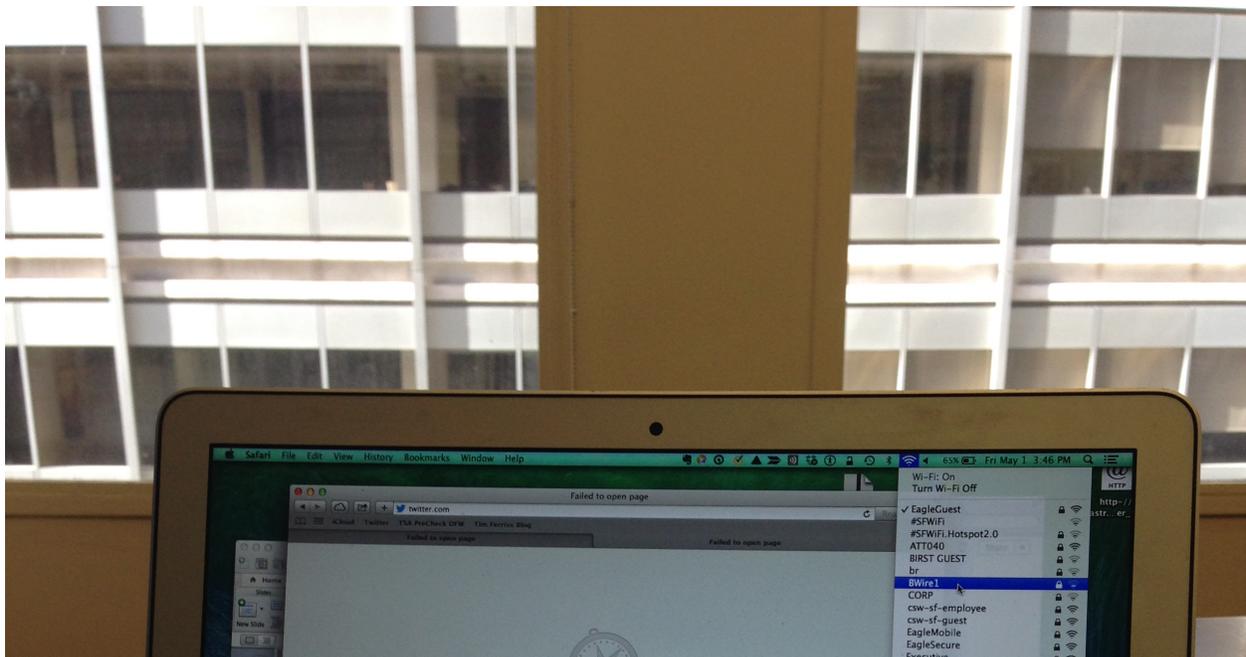
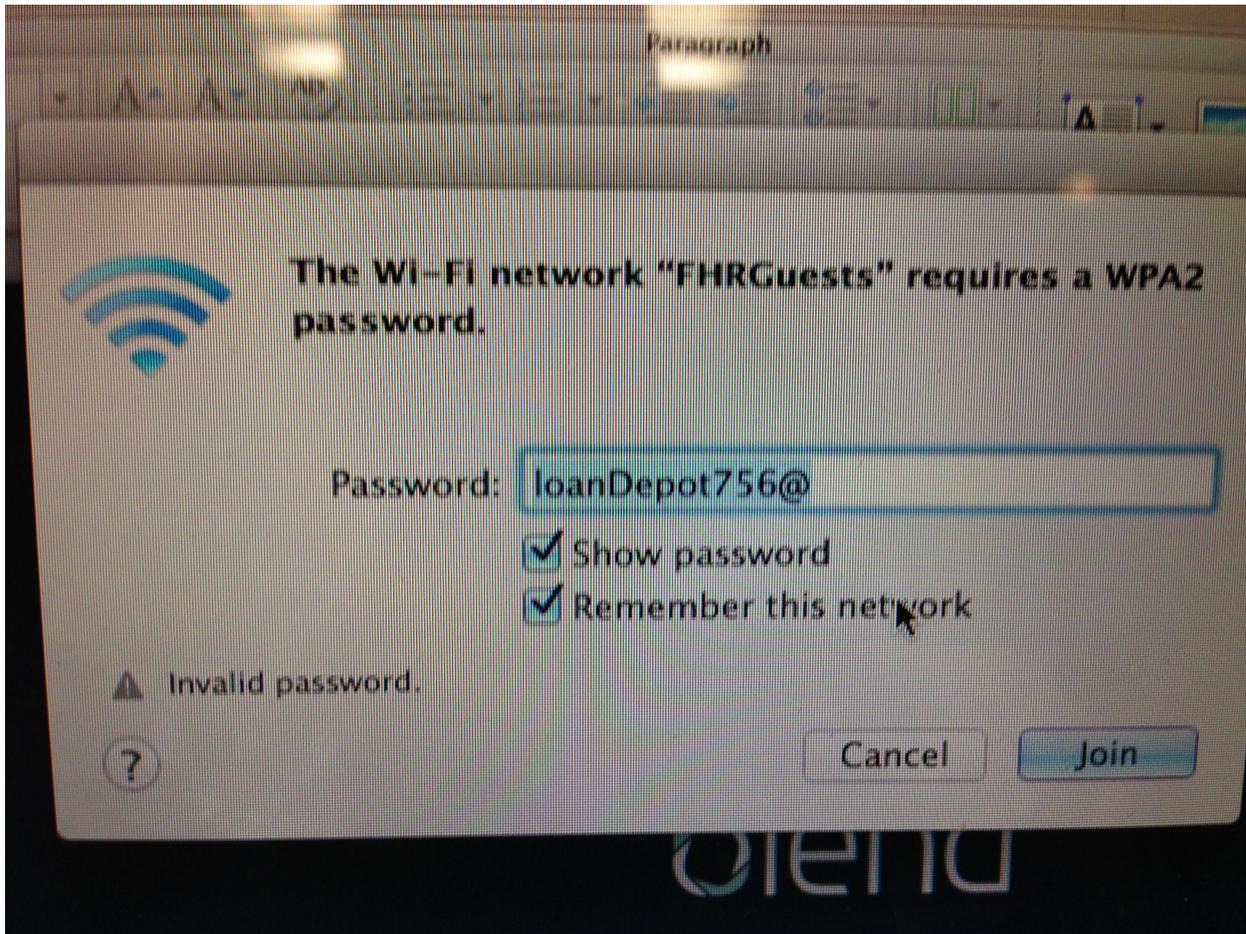
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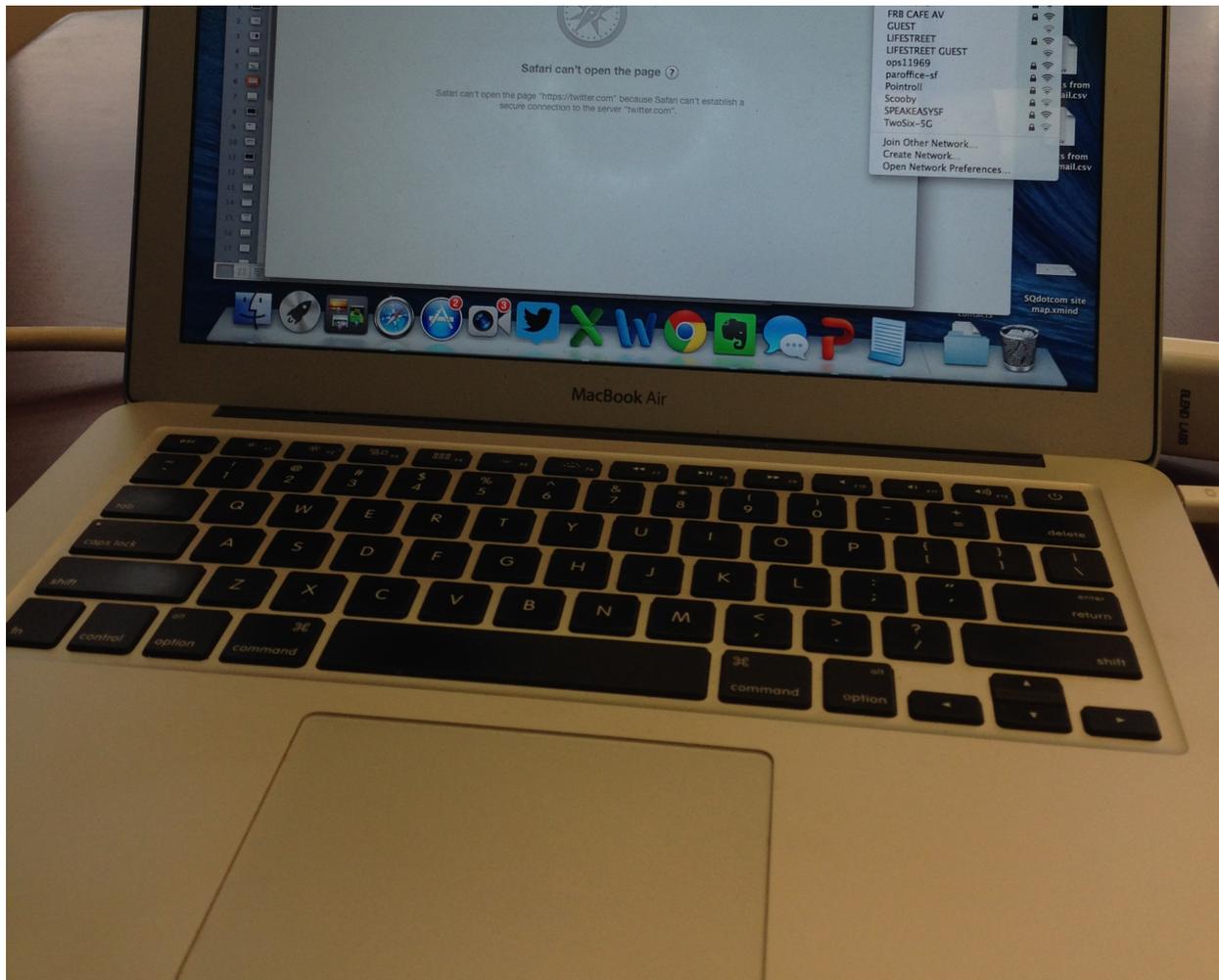


Cancel

Join

riend





11. What restrictions are there on website?

- Often I'll show a short video that our marketing team prepared that shows all of the key elements of our product. We loaded the video on Vimeo. I hit the 'play' button and then learned that the company banned access to Vimeo and YouTube.
- What if a key part of your product is integration with Facebook and LinkedIn and you're planning to show those sites? You better be sure that these websites aren't blocked by the IT department.
- If they are, be sure you have your own Internet source, or have a back-up plan. I usually default to my iPhone wifi connection, which even then can be hit or miss if you're in the bowels of a large, old building or you're outside your coverage areas.

Planning & Arriving

12. Arrive at least one hour before your appointed time if you are

Most meetings that start at the top of the hour - 10am, 11am, 1pm, 2pm etc - guess what? You're not the only visitor to the building that has a meeting with someone else at the building at that time.

For a 2pm meeting recently in Manhattan, I counted 35 people in the lobby trying to check in for meetings. There were three security guards. The security guards are paid to keep people out, not let them in. Imagine waiting for 35 people to individually give their driver's license to verify identification, then stand in front of a camera for a photo, then wait for their guest badge to print. And oh by the way, one of the groups has ten people and only two of them were on the manifest so the security guard has to get approval for the other eight to enter the building.

If you are visiting a smaller company or office, it's always easy to arrive check out that it's a small office, then head over to a local coffee shop for a few minutes for final preparations.

BONUS OFFER - Here's an example email that I've used:

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

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Scott Sambucci

VP, Customer Success & Sales @ Blend

(415) 596 0804

scott@blendlabs.com



blend - the future of lending

Google Chrome on Training Room Computers



Inbox x



11:58 AM (2 minutes ago) ☆



Hi Carol - good seeing you today. Just wanted to follow up and see if we're all set for having Google Chrome on the computers in the Training Room?

Looks like the Google Chrome that was installed on Krystle and Rebecca's local profile didn't transfer over to the training room.

Also, since we're moving Training Rooms on Wednesday, can we go ahead and make sure the 3-4 computers we'll be using in the other Training Room have Google Chrome as well? Thanks!



Compliments from a real-life Admin Assistant at a \$50 billion bank...

From:
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

FIRST REPUBLIC BANK

111 Pine Street, 2nd floor

San Francisco, CA 94111

415-288-8021 direct

ytom@firstrepublic.com

-----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