

# Planning for a Potential Partner Meeting or Phone Call

## Pre-Planning

- **What are your goals for the visit/phone call?**
  - It is important that you have a clear idea of what the expected outcomes of the call or visit are so the agenda can be developed appropriately.
  - If the agenda is too vague, the meeting will not focus on the issues that need to be addressed.
- **How much do you know about the company? How much do you know about the person you will be calling or meeting?**
  - Take the time to conduct some simple research about the company:
    - What kinds of projects do they produce or support?
    - What connections can you make with their mission and goals?
    - Make as many connections between your organization and the company as possible.
  - Is the person with whom you will be meeting a decision maker, or will he/she need to take your information and requests to a superior?

## During the Meeting / Call

- **Come prepared with opportunities for engagement:**
  - Have ideas of possible opportunities for involvement of the potential partner.
  - Even if the meeting or call only lets you know what the company IS NOT interested in, the meeting will at least give you information that can be used in a follow up call.
  - Your preparation for the meeting demonstrates how interested you really are in the company being a business partner.
- **What to Leave Behind / Next Steps**
  - Make sure to leave behind a piece of information that the potential partner can use to evaluate possibilities with your organization (i.e. SkillsUSA one-page facts sheet) and be able to share easily with others.
  - A pin or some sort of giveaway with the school's name or SkillsUSA on it is also a nice touch.
  - Make sure that next steps and roles are defined before the meeting or call ends.
  - Prompt and proper follow-up should be conducted after a promising meeting so that your effort is not lost.
- **Ask questions and LISTEN.**
  - Don't be the only one doing the talking. Allow the potential partner to share information about the business and offer ideas on how a partnership/relationship might be mutually beneficial.
  - Keep your presentation brief and elaborate as questions are asked.

## Potential Partner Questions

- 1) What has your exposure to our organization been?
- 2) What factors go into your company's philanthropic decisions?
- 3) What other types of organizations does your company partner with?
- 4) What does a successful partnership look like to your company? Does it include employee engagement, brand awareness and equity, student recruiting, connecting other companies to our mission, or something else?
- 5) How important is brand awareness and marketing to your company?
- 6) What interests you most about our organization?
- 7) What are the most critical results you would expect our organization to produce?
- 8) Is your company interested in developing/supporting special projects that change students' lives?