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?