

Process checklist for meeting lead

At notification/ project manager (PM) assignment	+ Send PM any meeting details: agenda, time, location/software platform, attendees, number of printed copies needed + Determine attendees; inform PM of those already secured + Confirm if we must strictly adhere to agenda (if applicable)
Strategy call	+ Discuss background (opportunity details, pricing, deal nuances, hot buttons etc.) + Review attendees and confirm if executive sponsor should be named + PM can assist in securing any needed attendees or senior leadership + Determine material and data needs + If in-person, discuss hotel options + PM to assist with booking prep space at desired hotel + If virtual, discuss meeting details: software platform, attire, camera use, who will drive content, and who will send invite
Kickoff call	+ Review overview document. Discuss pertinent background info (opportunity details, pricing, deal nuances, hot buttons) + Stress the requirement prep + In-person: one virtual prep and one on-site prep. Presenters should arrive and prep the evening before the meeting. + Virtual meetings: two dry runs in the correct software + Discuss agenda, win themes and differentiators, as well as process timeline + Set expectation that each presenter defines key takeaways for their section + Make expectations clear to presenters (meeting role, key topics/strategies, deliverables needed, timeline)
Final deck review	+ Review win strategy, agenda, and presentation materials + Compare slides with agenda and ensure content matches win themes, differentiators, and presenter takeaways + Make final edits to presentation content + Finalize handouts and equipment needs + Review prep and meeting logistics
Pre-meeting prep	+ PM to schedule and coordinate two in-character dry runs + Reiterate that content and talk track must match win themes, differentiators, and presenter takeaways + On-the-ground prep (in-person meetings) + Pre-departure virtual prep before deck/materials finalized + Arrive, prep night before the meeting; arrange morning prep if time allows + Review overview document and meeting prep guide + Work through client-tailored transitions between presenters + Perform in-character dry run + Dry runs for virtual meetings to be conducted in same platform as meeting
Meeting	+ Arrive 20 minutes before start time or join virtual software 10–15 minutes early + At meeting start, secure agreement on meeting objectives + Take detailed notes, keep time, and capture follow-up questions + Promote interaction throughout meeting + Seek commitment from consultant/opportunity on decision timeline + Confirm follow-up items
Post-meeting	+ Debrief immediately after meeting; discuss any items requiring follow-up + Connect with consultant to determine impression and additional follow-up + Send PM follow-up items and deadline + Send thank you notes