

# Preparing for a Meeting with a Corporate Partner

If you are meeting with a corporate partner to discuss a sponsorship proposal or charitable donation request, prepare just like you'd prepare for a new business meeting or job interview. You have one shot to make the best possible impression, so do your homework. The key to success? It should be all about them.

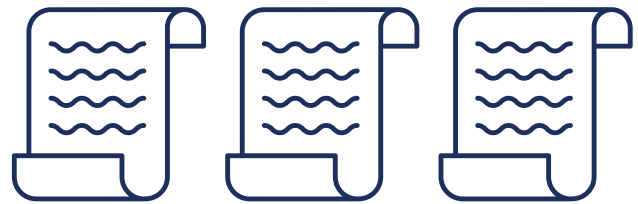
Whether you have worked with a corporate partner for multiple years or you are meeting for the first time, here's how to prepare for the meeting:

## 1. DO YOUR RESEARCH

Google the corporate partner, scan recent news and review their social accounts so that you are up to speed with any company announcements, events and other partnerships. Make sure you know who you'll be meeting with, and research each of the individuals.

## 2. PREPARE AN AGENDA

- Include welcomes/introductions with a list of names/titles attending the meeting from your organization.
- Ask for a quick update on their business and their goals for the year.
- Even though you have an agenda, in addition to asking about their business, ask if there are other items they want to cover and double check how much time they have for the meeting.
- Think strategically through long-term partnership opportunities.



## 3. BRING HARD COPIES

Bring hard copies of your sponsorship proposal for each person attending the meeting as well as a few extra.

- Proposals should be written to answer one question: what's in it for them?
  - » How can your organization/proposal help them achieve their business goals, reach key audiences, communicate key messages about their company, etc.?
  - » How is this request for a sponsorship or charitable donation going to make a difference for the corporate partner's brand?
  - » Why is your organization a good fit for the corporate partner?
  - » How can your organization extend the corporate partner's brand beyond an event or program? What are the value adds you can provide, outside of what's in the written proposal? What do they really care about?



## 1. BRING A RECAP REPORT

If you have worked with the corporate partner before, bring a recent recap report, preferably in a short presentation deck that includes the following:

- Branding and marketing examples/photos including the corporate partner's brand
- Social media post screenshots including the corporate partner and analytics
- Website inclusions
- Event photos including corporate partners or volunteers
- Media coverage including the corporate partner
- Metrics for the above plus audience/program participant size, number of volunteers, etc.
- Public outreach and/or education components (e.g., number of event or program attendees, booth visitors, community outreach efforts, etc.)
- Collaboration components (e.g., other partners or coordinated services)
- Data Collection/ROI (e.g., detailed analysis of the project outcomes and measurement tools)
- Lessons learned and opportunities for the future



## 5. BRING EXAMPLES

If you haven't worked with the corporate partner before, bring an example/recap report to show how you understand the importance of ROI.

## 6. STICK TO YOUR TIME

Lastly, stick to the allotted time and request a follow-up phone conversation to help answer additional questions. Take notes and send a recap email.