

MEETING PREP

Worksheet

Hint: Research who you are meeting with. Plan to confirm and expand your understanding of their organization and needs.

CALL TO ACTION

- Ask for their Business Card and other resources
- Offer Capability Statement, would you like a copy of it now or email/ sent through event app?
- Take notes

ASK EVERYONE

- What scopes do you use/ need?
- What certifications are important to you?
- Where should I be registered to work with your organization?
- Where do you post solicitations/ RFQ's/ opportunities?
- Where do you post awards/ past projects?
- What is the one thing you wish your vendors (prime or sub) understood?

FOLLOW UP

- Within a week after the event
- Email all contacts based on notes taken
- Suggested: "It was a pleasure to meet you at [Conference Name]. As discussed, please find my Capability Statement attached. I am registered/or will be registering on [sitename]. Please let me know if you have any questions."
- Include references discussed: I look forward to the bidding on [opportunity].

FEDERAL GOVERNMENT

- Where do you post resources to work with your agency: e.g. SB professional contact and training?
- How can I obtain a bidder's list/ list of primes?
- Where is your agency's forecast posted?

STATE/LOCAL GOVERNMENT –

- How can I obtain a bidder's list/ list of primes?
- Where is your agency's forecast posted?

INDUSTRY

- Where on your website is a list of solicitations you are bidding?