Vendor Presentation Tips

(For Presenters)

WEEKS IN ADVANCE

1. Provide, fax and email a formal Letter of Acceptance agreeing to participate at least two (2) weeks in advance of the scheduled Vendor Presentation.

2. Confirm the complete addresses for vendor shipment (inbound) of equipment along with Attention: Contact Person / Telephone.

3. Obtain maps, clear directions to campus and building, special VIP parking passes (reserved parking next to presentation building), special equipment forms (i.e., audio, visual, data line, conference call, speakerphone, etc.) at least 2 weeks in advance of the presentation.

4. Request at least two 6-foot catering tables (draped or covered) for vendor equipment and materials in the front of the room. If catering tables are too narrow, request four tables and cover appropriately.

5. Bring at least four (4) table coverings (e.g., black) to provide a professional appearance in case provided tables are not draped.

6. Confer with the Project Chair as to a mutually agreed Vendor Presentation Agenda.

7. Request a list of additional questions that the Vendor Evaluation Team would like included at least one week in advance.

8. Pre-arrange with the Project Chair for vendor access to the Presentation Room at least 2 hours in advance (or as mutually agreed).

9. Request "attended" telephone numbers to contact the Project Chair (or designate) if arrival is delayed (i.e., traffic, weather, flight delays).

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10. Prepare and print copies of the Vendor Presentation Agenda (if not confirmed by Project Chair).

11. Be sure all members of the Vendor team bring business cards with them to the campus.

12. All Vendor representatives should review the institution RFP prior to the Vendor Presentation.

13. All Vendor representatives should review the submitted Vendor Response prior to the Vendor Presentation.

14. Customize your presentation to the institution, its requirements and audience.

15. Preload system and/or slides with institution building and employee names (e.g., administrator, Project Chair) so as to customize your presentation to the institution, its requirements and audience.

16. Preload your system and/or slides with realistic data.

17. Samples cards are generally more memorable than company brochures.

18. "Live" readers and devices are always more impressive than canned or offline devices.

19. Know your system demonstration software thoroughly.

20. Rehearse your presentation with fellow team members so presentation does not look awkward and unfamiliar.

21. Prearrange all roles of vendor representatives at least a week in advance (i.e., prior to arriving at the institution).

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22. Determine in advance who will be in constant contact with your corporate office in case of technical issues and/or audience questions that require additional input.

23. Review or obtain a copy of the student newspaper as to current and relevant campus issues prior to arrival.

PRIOR TO MEETING

24. Arrive at the designated building at least one (1) hour in advance of meeting.

25. Immediately check lighting, shades, blinds, room temperature, HVAC fan noise, A/V equipment, projection screen lowered or setup, tables, chairs, refreshments, etc.

26. Determine appropriate room lighting settings (i.e., at beginning, during presentation, break, etc.) and designate who will be managing the room lighting.

27. Find directions to rest rooms for other vendor representatives as well as meeting attendees.

28. Designate one member of the team to greet all attendees (including contractors) and provide business cards and printed Agendas upon arrival.

29. Determine with Project Chair who will be formally welcoming both the vendor team and attendees – as well as introducing all members of the Vendor Evaluation Team.

30. Determine with the Chair when and how audience questions will be addressed – and who will inform the audience of that agreement.

AT THE OUTSET

31. As part of welcome, entice all audience attendees to stay for the entire Vendor Presentation.

32. Formally introduce all Vendor team members (name, title, background, presentation role).

33. If not previously announced by Project Chair, explain how questions would be preferred.

DURING THE MEETING

34. Have designated member(s) of the team stand in the back of the room to monitor sound, audience and communicate with HQ if necessary (i.e., communicating non-verbally with other team members).

35. Check with the Project Chair periodically as to presentation time, schedule and if more information is preferred.

36. Acknowledge Evaluation Team Members by name (if possible) and whether more information is preferred.

37. Acknowledge Project Consultant (if any) and monitor for presentation cues (as applicable).

38. Monitor and defer to the Project Chair when responding to questions so the Vendor Presentation remains aligned with the agreed Agenda.

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37. Defer to the Project Chair with any technical issues (vendor, room, equipment) that are not the vendor responsibility in order to keep the meeting moving forward.

38. In the event of highly technical questions, defer to the Project Chair as to the depth of response desired in order to maintain audience interest (i.e., perhaps suggesting a more detailed response can be provided during the designated break or after the formal session).

39. Include at least a 10-minute Break … which can also provide the audience with the opportunity to inspect demo equipment and/or address more technical questions with team members.

AFTER THE MEETING

39. Thank the Project Chair and all members of the Vendor Evaluation Team (individually if possible) for their invitation and continued interest in working with the institution in the future.

40. Inquire as to where equipment should be left (outbound shipping) and whether someone should be called to lock the presentation room upon your departure.

Simply … Be the Perfect Guest !

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