

# Vendor Presentation Tips

(For Hosts)

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## WEEKS IN ADVANCE

1. Determine weight (%) of Vendor Presentations (preferably in advance of issuance of a Request For Proposal).
2. Prepare, fax and email a formal Letter of Invitation to vendors at least three (3) weeks in advance of the scheduled Vendor Presentation.
3. Select and reserve a professional setting for Vendor Presentations.

NOTE: Considerations include proximity to building entrance, elevator (if not ground floor), quiet HVAC system fans, controllable HVAC temperature & circulation, functioning blinds/shades, microphone system (if applicable), comfortable seating, low noise distractions from hallway and/or adjacent meeting rooms, food service catering staff access, etc.

4. Reserve room for 6 hours (i.e., 2 hour setup, 3 hour presentation, 1 hour vendor pickup).
5. If two Vendor Presentations are scheduled the same day, better to provide two separate rooms (non-connecting or not adjacent).
6. Provide complete addresses for vendor shipment (inbound) of equipment along with Attention: Contact Person / Telephone.
7. Provide 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.
8. Notify potential campus attendees and invited campus contractors (including district managers) at least 3 weeks in advance of the Vendor Presentation (i.e., include date, day, time, length, room/s, etc.).

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9. Order refreshments for meeting (e.g., water, coffee, soft drinks, pastries, cookies) for audience and guests.

NOTE: Arrange with food service / catering to have refreshments setup one (1) hour prior to Vendor Presentation. If refills are necessary at the meeting break, be sure that food service personnel are respectful of this important VIP meeting by NOT entering the presentation room during the meeting and do NOT disturb the group while waiting. If possible, it is always best to have refreshments in a hallway or adjacent room.

10. Publicize "free refreshments" during invitation to presentation attendees.
11. Provide 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, provide four tables and cover appropriately.
12. Preview and test all requested audio / visual equipment for full function; if possible have a technician recheck with the vendor at least 30 minutes in advance for any additional needs or equipment replacement.
13. Confer with the invited vendor as to a mutually agreed Vendor Presentation Agenda.
14. Provide the vendor with a list of additional questions that the Evaluation Team would like included at least one week in advance
15. All Evaluation Team members should review both the institution RFP and the submitted Vendor Response prior to the Vendor Presentation.
16. Pre-arrange with campus officials (e.g., Security, Physical Plant, etc.) for vendor access to the Presentation Room at least 2 hours in advance (or as mutually agreed).

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17. Provide "attended" telephone numbers for vendors to contact if their arrival is delayed (i.e., traffic, weather, flight delays, directions, etc.).
18. Determine who will be formally welcoming both the vendor contingency and attendees (i.e., administrator, director, project manager) – as well as introducing all members of the Vendor Evaluation Team.
19. Designate a meeting Greeter to welcome all attendees as they enter the presentation room as well as direct them to refreshments and rest rooms.
20. Prepare and print copies of a Vendor Evaluation Team List (names, titles) to provide to the vendor upon their arrival.
21. Suggest to all Vendor Evaluation Team members to bring business cards with them to meeting as a professional courtesy.

## PRIOR TO MEETING

22. Provide clear signage to presentation room for all attendees (floor, room).
23. Inspect meeting room at least one (1) hour in advance of meeting.

NOTE: Check lighting, shades, blinds, room temperature, HVAC fan noise, A/V equipment, projection screen lowered or setup, tables, chairs, refreshments, etc.

24. Setup refreshment table(s) and trash cans.

NOTE: Arrange with food service / catering to have refreshments setup

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25. Provide a campus representative to meet vendor contingency and escort them to the presentation room upon arrival as a professional courtesy.
26. Provide vendor with directions to rest room locations.
26. Provide vendor with printed copies of the Vendor Evaluation Team List and Agendas.
27. Assist vendor with appropriate room lighting settings (i.e., at beginning, during presentation, break, etc.).
28. Determine meeting Greeter who will welcome all attendees, provide Agenda, and direct them to refreshments and nearby rest rooms.
29. Vendor Evaluation Team members should plan on briefly greeting vendor contingency and exchange business cards.
30. Vendor Evaluation Team Chair and Vendor should confer as to how and when audience questions will be addressed – and who will inform the audience of that agreement.

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## AT THE OUTSET

31. Formal welcome by the institution designate(s) to all attendees – especially the vendor representatives.
32. Provide a brief review of the status of the Vendor Evaluation Process for the attendees.
33. Encourage all audience attendees to stay for the entire Vendor Presentation.
34. Reminder to audience to turn off or set cell phones to vibrate as a professional courtesy to the presenters and other attendees.
36. Based on previous agreement, Project Chair or Vendor will communicate to the audience the manner in which audience questions will be handled.
35. Formal introduction and visual acknowledgement of all Vendor Evaluation Team members in the audience (name, title, area).

## DURING THE MEETING

36. It is the Project Chair's responsibility to assist the Vendor with keeping the Vendor Presentation aligned with the previously agreed Agenda and the audience focused on relevant questions.
37. Project Chair should immediately assist Vendor with any technical issues (vendor, room, equipment) and keep meeting moving forward.
38. In the event of highly technical questions, it may be best for the Project Chair to intervene and suggest addressing them with the vendor during the meeting break in order to maintain audience interest.

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## AFTER THE MEETING

39. The Project Chair should close the meeting by thanking both the audience and the Vendor for their participation.
40. All members of the Vendor Evaluation Team should personally thank the Vendor representatives for their travel and presentation.
41. The Project Chair (or designate) should assist the Vendor with equipment shipping arrangements if requested.
42. The Project Chair (or designate) should lock presentation room and/or contact technical staff for pickup of audio / visual equipment.
43. The Project Chair should recommend nearby restaurants and other travel accommodations if the Vendor will remain in the area overnight.

**Simply ... Be the Perfect Host !**

Rev: 10-01-2014

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