

17. A good first meeting with an SME

General suggestions for the meeting

Meeting with a SME decision-maker/owner is maybe the best way to establish a good first contact and explore possibilities for cooperation. We prepare some tips for you for arranging the perfect meeting with a business. The tips are designed having in mind the scenario of a first meeting with a company, and you can adapt it to your own organizations and needs. Our experience proved these tips worked, all of them - so try not to skip too much from these steps!

In the below scenario, we use the words owner and decision-maker interchangeably. Keep in mind that the owner might not be always available and you will have to talk with other decision-makers from the company, or it may also be a family business with several owners. But remember that the first meeting should be with a person who has real power in the company and is properly authorized to make decisions, such as those for supporting your projects. Also, it would be useful to check in your own network if somebody could recommend or introduced you to the SME owner/decision-maker. Having this recommendation gives you the chance to mention the common friend/acquaintance and have a better start in the conversation.

Building a good rapport in the meeting with the SME's representatives is very important! For that reason, it would be extremely helpful to know the person's communication style and personality. People are roughly divided into the following four personality types: analytical (blue), relational (green), directive (red) and expressive (yellow). If you are able to recognize the style of your interlocutor, try to "tune in" like with a musical instrument. For example, when talking with 'blue' personality people, speak slowly and have a very well-ordered and logical presentation. When speaking to 'green', build a good and friendly atmosphere and emphasize the relationship with people you help or work with. Talk with 'red' personality people about benefits for their organization or for themselves. When speaking to 'yellow', stress the uniqueness of your organization and your activities and how interesting and attractive your cooperation can prove to be.

Tips for a successful meeting with an SME

Before the meeting

1. Familiarize yourself with the company's website and identify key information:

- Profile of the owner/decision-maker;
- Company values;
- Social actions taken so far (if any);
- Main customers (recipients);
- Number of employees,

2. Prepare for the meeting and prepare information about your organization:

- Determine what your minimum/maximum objective is. How do you want to achieve it?;
- Prepare a presentation personalized for this particular SME, as a cooperation proposal and have your story ready;

Prepare printed key slides and a brochure/leaflet (if available);
 Have your business cards with you;
 Prepare a small gadget as a gift - if you have one that can be easily associated with your organization,

3. Allow 30 minutes (not less) for the meeting and confirm by email.

4. Check if there will be more people present at the meeting apart from the owner/decision-maker.

If so, take with you a selected employee of your organization (a senior employee that you can prepare as a contact person for the business, it would be the best). The meeting will then have symmetry and at the same time you can teach your co-worker how to conduct effective meetings.

5. Check the address and travel directions - you should be at the SME office 10 minutes before the scheduled time of the meeting.

6. Consider what type of clothes will be adequate for the organization in question (perhaps it will be OK to wear the clothes you wear usually, but it depends on what style you have and on the company dress code).

During the meeting

1. Introduce yourself and praise the SME for something specific that you discovered from the website or from information known locally.

2. Thank you for the opportunity to meet.

3. Suggest a meeting agenda and confirm whether it is convenient for the decision-maker. Be flexible and pay attention to the signals coming from the other party in the conversation. Confirm the time of the meeting (it is of great importance as it gives you space for conducting the meeting in a natural way).

4. Ask what form of presentation will be most convenient for the decision-maker (speaking or showing slides - printed or from an overhead projector/laptop). Remember that different people have different preferences (visual/auditory).

5. Make a short story - a 'business card' of your organization. Speak about yourself - why you are involved in this form of support, who you are, show your emotions. It is important that you establish a personal relationship with the decision-maker and present yourself not only as an NGO employee, but as an individual as well.

6. Present your project/organization story and the cooperation model you propose, encouraging the decision-maker to ask questions so that you can have meaningful conversation, and not a one-way presentation. Remember to show the benefits of cooperation for both your beneficiaries and the SME.

7. At the end, ask which proposals/cooperation opportunities were the most interesting for the decision-maker. For those ideas that the decision-maker seems more interested, invite him/her to work together to further develop the concept of the cooperation.

Useful tip: it is a good idea to draw on a piece of paper or flipchart and encourage the decision-maker to visualize and draw their insights. This method works especially well with more visual thinkers.

8. Summarize the arrangements you agreed upon for cooperation, and ask for confirmation of the next steps to take together to put into practice the things discussed.

9. Thank for the meeting and find out whom you should contact/talk to for the next steps of cooperation.

10. If none of your proposals/ideas turned out to be interesting for the decision-maker, encourage him/her to think or mention **what their cooperation interests would be**, for working with your organization.

11. Remember to leave the business card and the materials that you have prepared. Ask for permission to follow-up, by phone or email, as agreed.

12. Say goodbye and thank for the meeting and praise the decision-maker for a particular aspect of his or her activity during the meeting.

After the meeting

1. Write a memo from the meeting and send it as a .pdf to the decision-maker, thanking them for the meeting. Make sure you include in the email also key people in your organization that will be more involved in the further cooperation process.

2. Agree with the key people in your organization what further steps you will take and who will be responsible for them, for the cooperation with the SME.

3. Make sure that the actions included in the memo are implemented, paying special attention to the deadlines included in the memo.

4. Make sure that all the materials/documents concerning this new potential partnership are recorded electronically, in one dedicated folder.