✔ Boardroom Preflight Checklist

Before the Meeting	Clearly defined roles. Division of tasks along the lines of "work of equal value", not "task/3" At least 1 "dry run". You should be ready on "the Friday before the Monday", not "getting ready". Know your assigned role beyond the scope of what you will be covering in the boardroom. Allows you to better handle questions. Know your team mates' roles and content. Same reason as above. Have a "B Plan" for all possible catastrophes (ie team member not showing up, equipment failure, etc). Usually involves both points above.

Slideshow & Information Package	Consistent corporate branding is important. Business cards a plus. Basic order… cover letter, executive summary, slide presentation, workflows/use cases. Pages should be numbered. If you refer to any information during your presentation, it should be by page number. If your slides are numbered, cross referencing can be done as well. K.I.S.S. … Keep It Simple for Stupid. You are talking to potential clients, not IT professionals. You need to present info in a clear, concise format that they understand. As always, spelling and grammar are important everywhere!

Appearance	Professional attire (includes shoes). Don't have any??? Go shopping… you'll need a killer interview outfit soon for "real" job interviews anyway. Get it now, and use it for the rest of the year. We won't mind seeing you in the same outfit every presentation and different employers won't know you've only got one outfit. Clothes are clean and ironed. Consistent team dress code. Hair washed and combed. Personal accoutrements (pens, clipboards, portfolios, etc) look professional. Bonus if the team has the same items. Sit professionally, do not slouch. Look engaged during the entire presentation, not zoned out because "it's not your turn". Smile. It shows confidence.

During the Meeting	Remember that this is a role playing course. Although “Joe the client” may be causing you difficulty, “Joe the instructor”, or “Cathy the instructor” etc. may be assessing your reactions positively. Real simulation that has value as a learning tool always involves stress testing… don’t take it personally. Strong opening. Introductions, a statement of the purpose of the boardroom, a brief summary of what will be covered, a brief explanation of the content and role of your information package. Don’t interrupt your team mates when they are presenting their information. If a team mate is making an obvious mistake (ie giving out the wrong info, etc), intervene in a manner that corrects the mistake without damaging the credibility of your team mate. If a team mate is losing control, find a way to intervene and redirect the conversation back to a positive direction. Don’t talk over or interrupt the client, even if they are saying nothing of value. The budget in their pocket is of value! If a client says something wrong, try to clarify without “trying to win”. If need be, ask to discuss at a future time and move on. Don’t move on unless you ask the client if it ok to do so. Students often move on too quickly to get out of an uncomfortable situation. Direct confirmation style questions to key client personnel to confirm you are on the right track. Take notes! It shows the client everything they say is of value (even if it isn’t). Your notes should include anything you perceive going wrong within your own team, or its interaction with the client. Strong closing. A brief summary of what you covered, and what your major conclusions are. List any major points the client put forward, and any action items that were agreed to (ie “we’ll be meeting to discuss blah blah in the next day or so). Discuss what you will be doing next, and any expectations you have of the client. THANK THEM for coming.

Using this checklist during the meeting will help with your debrief later.

After the Meeting	Debrief. The sooner the better, while things are fresh in your mind. Forensic debrief doesn’t just involve what you did right. Document everything you or your team mate(s) did wrong. It’s uncomfortable, but important. Your final debrief documentation should be realistic but positive, similar to the Progress Report summaries Follow up on any action items or actual promises you made in the boardroom. Relax. This course is but a stage and we are mere actors upon it.