

Before the Meeting

Be sure to secure:

- ✓ Date and time of the meeting, 6-8 weeks in advance
- ✓ Vendor sponsor
- ✓ Approved location

Identify a few attending Members and ask them to share the value of IDOC at the meeting

Make sure you have IDOC folders, sign-in sheets and pens

Be prepared to discuss the topic:

- ✓ Identify relevant topics
- ✓ Develop some conversation starters
- ✓ Bring a personal anecdote specific to the topic

During the Meeting

Welcome Reception:

- ✓ Make sure all attendees sign in (if possible have a staff member accompany you to assist)
- ✓ Engage in conversation with attendees
- ✓ Start the meeting on time

Opening comments and Vendor presentation:

- ✓ Introduce yourself, where you practice and for how long – have attendees do the same
- ✓ Ask attendees to share what they would like to gain/discuss related to the meeting
- ✓ Introduce the vendor sponsor and thank them for their support of IDOC and study groups
- ✓ Keep the vendor presentation to 15-20 minutes long

Study Group discussion (not a lecture):

- ✓ Be aware of the conversation flow and strive to stay on topic
- ✓ Engage every attendee to share their experience

Closing the meeting:

- ✓ Have attendees share a key take-away from the discussion
- ✓ Discuss how IDOC brings value to member practices
- ✓ Call on the Members you identified to share their experiences with IDOC
- ✓ Explain to prospects there is a Tonight Only Special for NEW Members

After the Meeting

Wrap up:

- ✓ Use the sign in sheet to make notes on any prospects
- ✓ Email or fax the sign in sheet to IDOC

Attendee follow-up:

- ✓ Send a thank you note to all attendees
- ✓ Include some of the top tips from the discussion and remind them to stay tuned for the next meeting

If you have any questions, please contact your IMD Coordinator, Ilana Thombs at 203.853.3333