



# VIRTUAL INNOVATION PROGRAM



**Delivering innovative cold chain  
education & networking virtually**  
October 14 – November 10, 2020

## **Virtual B2B Meetings Best Practice Template Guidance & Recommendations**

Presented by the Global Cold Chain Alliance

# Solutions: Tools & Templates

- Pre-planning Sharing & Alignment
  - Internal Alignment Guide
  - Partner Sharing Elements
    - Goals of Meeting
    - Data Sharing
    - Key Strategies
- Meeting Agenda
- Post-Planning Follow up
  - Share Meeting Notes
  - Key Opportunity Summary with Owner & Timing



# Suggested Sharing Elements

## 1. State of Business

- a. Sales trend metrics if applicable
- b. Performance scorecard if applicable
- c. Status of current initiatives / joint opportunities

## 2. Goals of Meeting

- a. What you hope to achieve coming out of the meeting
- b. Who will be attending the meeting

## 3. Strategies

- a. Organizational strategies relevant to customer/trading partner/prospect
- b. New products and/or capabilities relevant to customer/trading partner/prospect
- c. Mutually beneficial opportunities
- d. Market specific insights and strategies

# Possible Questions for Meeting Participants

1. What are your goals for our meeting at the Virtual Innovation Program?
2. (For an introduction or new relationship) What is the background of our organization as well as your overall strategy and focus?
3. (For existing business relationship) how has our performance been over the last year? What are the main drivers of the performance?
4. How successful were we as partners in executing against priorities / opportunities? To what do you attribute those results?
5. What are your organization's key strategies for the upcoming year? Is there anything we can do to support those strategies?
6. Are you developing any new products and/or building new capabilities which may be relevant to our relationship?
7. What do you think are opportunities that may be mutually beneficial to both of our organizations?

# Template: Meeting Agenda

Discussion Topic	Time Allocation for Meeting (minutes)
Introduction & Welcome	
3PL Warehouse – State of Business	
Vendor/Solution Provider – State of Business	
State of Business Discussion	
Vendor/Solution Provider – Strategies & Opportunities	
3PL Warehouse – Strategies & Opportunities	
Strategies & Opportunities Discussion	
Agree on High Priority Opportunities	
Next Steps	

# Template: Meeting Recap Notes

<b>Customer/Trading Partner/Prospect</b>		
<b>Vendor/Solution Provider - Attendees</b>		
<b>Our Attendees</b>		
	<b>Agreed Upon Opportunities</b>	<b>Owner</b>

# GCCA Contacts:

## **Website and Meeting Help:**

Katie Sastre

Programs Director

P: 703-373-4300

E: [ksastre@gcca.org](mailto:ksastre@gcca.org)

## **Sales and Other Questions:**

James Rogers

Sr. Director of Business Development

P: 703-373-4303

E: [jrogers@gcca.org](mailto:jrogers@gcca.org)