



Brainstorm

Pre-Work

Before meeting, we recommend taking these steps to ensure your time is best spent:

- 1. Identify who will be meeting:** by yourself, with your internal team, or with trusted rep friends. **Pro-tip: Invite anyone who may be a great contributor or will benefit from being a part of this meeting.*
- 2. Identify how you will be meeting:** in-person vs. virtual. **Pro-tip: Tune in to the video to learn about virtual tools we've tested and recommend.*
- 3. Set a date and time.** We recommend committing a half day — there will be a lot to dive into!
- 4. Commit to the pre-work.** Have each member identify firms in their territory before meeting. **Pro-tip: For the best use of your time, we recommend an in-depth analysis of firms, relationships, targets, etc. Our pre-work worksheets are easy to use and are designed for identifying target firms.*