



## Meeting with the leader

*How to make a favorable impression*

**M**eeting with a company president or CEO is unlike other meetings. The degree to which you prepare and conduct yourself will determine if you make a good impression, or are viewed as a time waster (sorry, I know that's harsh, but it's true!).

Nothing is more valuable to a CEO than time. Most have 12+ hour days filled with back-to-back meetings, presentations, negotiations, meet and greet events, board meetings, and educational opportunities. Time is measured in minutes, not hours.

Discipline is infused in everything they say or do. It's how they handle many horizontal priorities without becoming overwhelmed.

Ultimately, they are paid to make four to five BIG decisions each year, which results in market share and/or profitability gains, or job loss(es).

They speak the language of strategy and metrics, and have a dashboard that tracks daily/monthly/quarterly/annual results.

Whether you are a manager, employee, sales professional, or consultant, follow these eight steps and "wow" the executive:

### **1. Submit an outcome-driven agenda**

- » Send an agenda 24 hours in advance and include the outcome that you want to accomplish.

### **2. Prepare**

- » Determine how you will set the tone and frame the conversation. Limit your description to one or two sentences. Be sure to practice saying it out loud until it rolls off your tongue in a conversational tone.
- » Research the president/CEO. Read everything you can to



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- eliminate blindspots.
- » When appropriate, talk to other key stakeholders who may influence this decision so you gain their perspective and are clear about their position before you meet with the president/CEO.
- » Align your message with what's important to the president/CEO.
- » If your position is diametrically different, be sure to be suggestive, not defensive.
- » No matter how emotionally charged or personal the situation, maintain your composure.
- » Know what you want the president/CEO to do at the end of

the meeting. You may be asked, “What are the next steps?”

### 3. Analyze

- » Justify your recommendation using fact-based data. A picture, chart, graph or survey summary is worth a thousand words.

### 4. Arrive on time

- » Plan to arrive 5 – 10 minutes early.
- » Lateness can be interpreted as “selfishness,” “lack of discipline” or “lack of respect.” Many CEOs do not accept traffic as an excuse. Instead, they associate it with poor planning.
- » If you find yourself delayed, contact the executive immediately. You may need to reschedule depending upon her schedule or frame of mind.

### 5. Be succinct

- » Speak in bullets, not full paragraphs. Refrain from diving into details. If more information is needed, specific questions will be asked.
- » Bring a “one-pager” that highlights these key points:
  - State the issue/opportunity.
  - Describe the potential impact/consequences.
  - Present your recommended solution and measureable outcomes.
  - Describe why it will be a benefit to the company.
- » Be prepared to discuss “the how” (at a strategic level) when asked.

### 6. Take notes

- » It shows the president/CEO that you are serious about the topic.
- » Your notes are a record of the

meeting, and you may be asked to refer to them in the future.

### 7. Project humble confidence

- » Demonstrate poise and self-confidence. Have good posture. Make eye contact, which doesn’t mean staring. Smile, when appropriate. Be mindful not to nod your head up and down non-stop when the leader is talking. A few nods will suffice.
- » Your idea might be the right idea, but you may not receive support for reasons that the president/CEO can’t disclose. How you respond is important. Always take the high road and be polite. The impression you make will last far longer than the meeting.
- » If the executive gives you feedback, consider this a compliment. She will remember how graciously you received feedback. Maintain composure and say, “Thank you.”

### 8. Sales professionals beware

- » Reserve the word “partner” for those opportunities when your company can deliver exceptional value and/or will share the risk. True partnership is about combining expertise that advances the client’s business success. If your company doesn’t engage at that level, the word partnership may be perceived as just another overused buzzword.
- » Be different. Conduct research, and then craft compelling ques-

tions that cause the president/CEO to sit back in her chair and say with surprise, “That’s a good question. I hadn’t thought of that!” This builds credibility.

- » Presidents/CEOs typically allocate about 20 minutes for an initial meeting with a sales professional. During the meeting, keep track of time and never run over. If the president/CEO is interested in the conversation, you may be invited to stay longer.
- » If you are delivering a presentation, forget the rehearsed script and instead, be conversational. When you see that she understands the concept, move on to the next point. It is assumed that you know the information and have expertise.
- » Follow up after the meeting. Thank the president/CEO for her time and summarize the key points from the discussion. Detail the next steps and agreed to deliverables.

**ONE FINAL NOTE:** If you finish the conversation in less than your allotted time, don’t stay just to fill up unused time. The president/CEO will either thank you, or invite you to stay. Either way, your consideration will be appreciated. ■

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