Prospect Management Meeting Agenda

Meeting Objective

To collaboratively assess and advance strategic engagement with key prospects

60 minutes

1. Key Organizational Updates (3 min)

- Brief updates relevant to the team (e.g. upcoming events that can be used for cultivation, case for support resources and templates)

2. Recent & Upcoming Prospect Interactions (15 min)

- Reference portfolio report
- Highlights of key meetings (1-2 per team member)
- Discuss upcoming meetings – brainstorming and support needed
- Review past due interactions – update and reassess as needed

3. Prospect Pipeline Data Updates (10 min)

- Reference pipeline report
- Review of current pipeline – stage, likelihood, amount – update as needed
- Review implications for forecast and goals

4. Sharing of Newly Identified Prospects (10 min)

- Presentation of prospects surfaced through research or referrals
- Assignment of follow-up actions or deeper research

5. In-Depth Discussion of Selected Prospects (20 min)

- Deep dive into pre-selected prospects
- Review of research, identification of natural partners and engagement opportunities, refinement of solicitation approach as appropriate.

6. Wrap-Up (2 min)

- Summary of decisions and action items