



# NETWORKING PLAYBOOK

GET THE MOST VALUE OUT OF YOUR INTERACTIONS AT **ISA24**

# Strategize for Networking Opportunities

## How to Best Prepare

- Hold an internal meeting to discuss strategy / objectives for the event as a whole
- Download appointment scheduling tool (launch date: March 2024)
- Review ISA company attendee list (available within the appointment scheduler tool)
- After obtaining the company attendee list, determine appropriate level of leadership attendance needed to accomplish goals / objectives
- Consider assigning a “company admin” to handle all scheduling for your staff
- Review company attendee list to determine network meeting potential:
  - Existing relationships
  - Prospecting
- Existing Relationships:
  - Send list to internal stakeholders for information including: Current situation, engagement, projects, SWOT, training needs
- Prospecting:
  - Preliminary research, send list to internal stakeholders for interest / opportunity
- Pull reports for other data points



### Quick Tips

- Consider coming prepared with a booklet that includes important information to drive constructive conversations.
- Download the Event App to easily access your appointment schedule.
- Try reaching out to attendees pre-event. Help everyone come to the meeting well equipped by sending a high level agenda for the meeting to keep everyone focused.
- Make sure to accept / decline meeting requests in a timely fashion.
- Need help assigning a company admin in the ISA24 scheduling tool? Reach out to [info@isapartners.org](mailto:info@isapartners.org)

# I'm a Manufacturer

## Recommended Discussion Points for Private Meetings



### EXISTING RELATIONSHIP

---

- Corporate Updates: Sales team coverage, value package, trainings, promotions, new products
- YTD Sales Performance Dashboards
- Pipeline Review
- Feedback from Field Sales: SWOT
- End-User Targets & Support Needed
- Key marketing initiatives
- On time delivery



### PROSPECTING

---

- Short value proposition
- Product innovation
- Markets you serve
- Differentiators
- Sales team coverage
- ERP system capabilities
- Growth objectives
- e-commerce support



### Quick Tips

- Research prospects pre-event & study website: location / area covered, competitive lines, key end users.
- At the end of a meeting, conclude with a clear understanding of who is going to communicate what and to whom, make sure next steps are clearly defined.

# I'm a Distributor

## Recommended Discussion Points for Private Meetings



### EXISTING RELATIONSHIP

---

- Current State - YTD
- Current State Projections - YE
- Pipeline Review
- Project Review
- Conversations Review
- Supply Chain State
  - No Issues
  - Current Issues
  - Anticipated Future Issues
- Action Steps
- Follow-up Cadence



### PROSPECTING

---

- Current Category Requirements
- Current Category Overlap
- Category Gap Analysis
- Potential Relationship Strategy
- Relationship Expectations
- Identified Obstacles
- Action Steps
- Follow-up Cadence



#### Quick Tip

Research prospects prior to scheduling meeting.

# I'm an IMR

## Recommended Discussion Points for Private Meetings



### EXISTING RELATIONSHIP (DISTRIBUTOR)

---

- Top Principals
- SWOT
- Top Growing SKUs
- Outstanding Issues
- Available Resources
- Training Capabilities

### EXISTING RELATIONSHIP (MANUFACTURER)

---

- SWOT
- Sales Projection
- Top Distributors / End Users
- Top Growing Accounts
- Next Quarter Goals
- Needed Resources
- Resource Changes
  - Personnel, bricks & mortar, digital/e-commerce



### PROSPECTING (DISTRIBUTOR)

---

- Current Needs
- Training
- Inventory Management
- National and regional conventions / expos & open houses
- Tech info / Recommendations

### PROSPECTING (MANUFACTURER)

---

- Expectations
- Geographical Territories
- Competitive Landscape
- Principals relationship with other IMR's (Previous & Current)
- House Accounts

# I'm a Service Provider

## Recommended Discussion Points for Private Meetings



### EXISTING RELATIONSHIP

---

#### Current State:

- Discuss current ERP system status, modules, and recent changes
- Highlight performance metrics and KPIs

#### Challenges:

- Identify current ERP system challenges and pain points
- Encourage feedback and discuss impacts on operations

#### Problems to Solve:

- Prioritize issues based on impact and urgency
- Address unresolved problems and their implications

#### New Innovations:

- Present latest ERP innovations and how they address challenges
- Share relevant case studies and ROI insights

#### Action Plan and Recommendations:

- Summarize key points and provide initial solutions
- Discuss next steps, timelines, and responsibilities

#### Open Discussion and Questions:

- Encourage questions and address concerns.

#### Meeting Closure and Follow-up:

- Thank the customer, summarize action items, and schedule follow-up.

#### Additional Topics:

- Data Security and Compliance
- User Training and Adoption
- Integration with Other Systems
- Mobile and Remote Access
- Customization and Scalability
- Customer Support and Service Quality
- Business Continuity and Disaster Recovery
- Cost Management and ROI

# I'm a Service Provider

## Recommended Discussion Points for Private Meetings



### PROSPECTING

---

#### **Current State:**

- Understand potential customer's current business operations, industry, and recent changes
- Learn about their existing ERP system and its modules

#### **ERP System:**

- Discuss their ERP experience and needs
- Share info on our ERP solutions

#### **Decision Makers/Stakeholders:**

- Identify key stakeholders, roles, and expectations

#### **Potential Areas of Fit:**

- Explore where our ERP aligns with their needs
- Share relevant case studies

#### **Arrange for Follow-up:**

- Summarize key takeaways and set next steps

#### **Open Discussion and Questions:**

- Encourage questions and address concerns

#### **Meeting Closure and Next Steps:**

- Thank for their time and confirm action items

#### **Additional Topics:**

- Business Goals and Pain Points
- Budget and Financial Considerations
- Customization and Scalability
- Implementation Timeline
- Data Migration and Transition
- Support and Training

# I'm a First Time Attendee

---

- OPT-IN during online registration to secure your spot at the day 2 networking lunch. This is a great opportunity to connect with peers in the channel.
- Attend all receptions!
- Download the ISA23 event app (released approx. 4 weeks prior to the event) to review the attendee list and stay on track with the daily schedule.
- Consider arriving into Charlotte early and attending a pre-conference workshop on April 15.
- Have pre-event questions? Contact us at [info@isapartners.org](mailto:info@isapartners.org)
- Questions during the event? Visit the ISA24 registration / information desk to speak with an ISA staff member, located at the Charlotte Convention Center - Concourse A.



## Quick Tip

Make sure to grab your “first time attendee badge ribbon” at the onsite registration desk. All ISA24 attendees are encouraged to introduce themselves and engage with first time attendees.



# Networking Opportunities

## HIGHLIGHTS

### PRE-EVENT WORKSHOPS

3 interactive workshop offerings held prior to the kickoff of ISA24 focusing on *Profitability, Channel Alignment, and Workplace Culture*.

### CHARITY GOLF OUTING

Join us for a morning of golf at the prestigious Ballantyne Country Club on day 1, followed by an afternoon reception and awards ceremony. *A portion of the proceeds will go towards supporting the Ronald McDonald House - Greater Charlotte Area.*

### CHARITY 5K FUN RUN/WALK

Join fellow participants bright and early on Day 2 for a 5K event that welcomes both runners and walkers alike! Taking place along Charlotte's celebrated Rail Trail, enjoy a picturesque pathway that unveils the city's vibrant charm. Volunteers will be stationed along the path to help keep you on course. *A portion of the proceeds will go towards supporting the Ronald McDonald House - Greater Charlotte Area.*

**AT ISA24 WE BRING THE CHANNEL TOGETHER TO INTERACT IN VARIOUS WAYS**

## INTERACTIVE NETWORKING LUNCH

Elevate your networking game with our innovative randomized lunch seating. Whether it's your first time or you're an ISA convention pro, this fresh approach ensures you'll connect with new faces.

Dive into engaging discussions sparked by participant questions curated before the event. Enjoy a plated hot lunch as you uncover shared experiences and fresh perspectives. You must opt-in during the online registration process to harness this unique chance to broaden your network.

## EXHIBIT HALL FLOOR

### PRIVATE MEETINGS

With the help and voice of our members, ISA24 will feature an appointment scheduling tool that provides a powerful, and seamless, networking experience that's user-friendly and easy to navigate.

Schedule timeslots that best fit your needs!

- 15 minutes, best for prospecting
- 30 minutes, best for established relationships

### NETWORKING LOUNGE

A great place for attendees to mingle and make connections.

Lounge will include:

- Coffee bar & drink station
- Engagement activities
- Media Circle

## RECEPTIONS

### OPENING PARTY @ NASCAR HALL OF FAME

Immerse yourself in the world of NASCAR at the ISA24 Opening Reception! Discover the rich history of the sport through a visit to Glory Road and a journey into the NASCAR Archives, all while indulging in open bars and abundant food stations. Participate in exciting interactive activities, such as:

- Pit Crew Challenge
- Broadcasting a Race
- Racing Simulators

### TOSS & TOAST: HAPPY HOUR + CORNHOLE TOURNAMENT

Hosted by ISA IMRs, taking place on the show floor after day 2's conclusion, this event offers an open beer/wine bar, and a lively cornhole tournament for a touch of competition. It's the perfect way to unwind, connect with fellow attendees, and add some fun to your event experience – all are welcome!

### EMPOWER HOUR: WOMEN IN INDUSTRY COCKTAIL HOUR

Celebrate the women shaping the industrial world at the stylish JP Charlotte at The Westin Charlotte, complete with exquisite hors d'oeuvres, an open bar, and inviting firepits. Amidst ambient music, engage in rich conversations, share experiences, and toast to the accomplishments of industry-leading women



## CHARITY GOLF OUTING

Tee off at ISA's Charity Golf Outing on April 15, 2024, at the esteemed Ballantyne Country Club, Charlotte, NC. This championship 18-hole course, designed by Rees Jones, stands proud among North Carolina's top courses. Immerse yourself in networking with industry leaders, marking a dynamic start to your ISA24 experience.

Your participation not only ensures lasting memories but also supports a heartfelt cause: a portion of the proceeds will be donated to the Ronald McDonald House of Greater Charlotte.



### LOCATION

Ballantyne Country Club  
11120 Ballantyne Crossing Avenue  
Charlotte, NC 28277

### DATE

April, 15, 2024

### TIME

7:00 AM ET Shuttle Departure  
9:00 AM ET Shotgun Start

### COST

\$450 Single Player  
\$1,650 Foursome

Includes: Golf, carts, shuttle pickup/drop off, breakfast, lunch, on-course beverages, on-course contests, 19th hole reception, and awards.

Note: Service providers MUST purchase a foursome. Single players will have the option to request pairings within registration, we will try our best to accommodate, but we cannot guarantee. Guarantees can only be made by purchasing a foursome and submitting all player information.





WHERE  
**BUSINESS**  
GETS  
**DONE**

**Charlotte  
Convention Center**

April 15-17, 2024  
Charlotte, NC