Playbook for Virtual Scheduling Strategies & Forum Best Practices

January 25-27, 2021
Table of Contents

1. Overview
2. Meeting Strategy & Logistics
3. The Scheduler’s Role
4. Scheduling Process
5. Forum Best Practices
6. Key Dates to Remember
7. Your IFDA Contacts
IFDA’s annual signature event is the must-attend executive level meeting for distributors and suppliers looking to maximize growth of their foodservice channels.

• Curated for the top level of foodservice executives, the IFDA Partners Executive Forum is the optimal intimate setting for strategic discussions between foodservice distributors and manufacturers.
• Foodservice Distributors representing over $155B in annual sales regularly participate.
• In three days, company teams may hold 30+ meetings to discuss strategies, goals and objectives to improve your bottom line.

The Partners Executive Forum facilitates the meetings that will accelerate your business objectives.

Who Attends?
• IFDA Distributor Members and top national Manufacturer Partners
• Head of Firm (CEO/President)
• Most senior executives responsible for corporate strategy
• High Level Account Managers with knowledge of specific trade relationships
• Bringing the right Team maximizes your results!
• Strategy
  • Your team should review the list of participating trading partners and prioritize your list prior to scheduling (participating company lists available on IFDA website)
  • Plan to utilize all appointments time slots and maximize all three days of the Forum
  • Once your appointment schedule is set, your team should determine most appropriate team members to bring to each meeting

• Meeting Times
  • Mon/Tues/Wed: 45 minute meetings on the hour (9:00 am-7:00 pm) last meeting time at 6:00 pm with 15 minute breaks in between. Please note meeting times will be set on the Eastern Standard Time Zone.
  • Virtual Meetings are facilitated within the platform using secure and unique Zoom Rooms and Meeting IDs
• Your Scheduler is the main point of contact for your company and the person responsible for setting and accepting your company’s appointments.

• Notify IFDA immediately if your Scheduler contact changes at any time during the scheduling process.

• Appointments are made directly through the Virtual Platform between distributor and manufacturing companies.

• Schedulers will be able to modify schedules up until the event begins and throughout the event.

**Scheduling will open in tiers:**
Monday, December 7 at 11 am for Distributors, Platinum and Gold Partners
Wednesday, December 9 at 11 am for Silver Partners
Thursday, December 10 at 11 am for all companies
• Use your company’s prioritized list.
• Direct scheduling through the virtual event platform allows you to directly request and accept appointments without matchmaking.
• Only time slots that are mutually available will be listed.
• You will get notified of appointment requests, accepts, and declines via email.
• Maximize all three days (M – W) of the Forum for appointments.
• Allow for flexibility!

Appointments are booked directly with your trading partners. *(IFDA does not set appointments for your schedule)*
• Be courteous and respond to ALL requests in a timely manner.
• Consider accepting new/unexpected appointments (discover a hidden gem, new category, opportunity, relationship).
• Confirm all appointments via the platform.
• Be patient, schedules continue to adjust up until the event – the process generally continues for several weeks.
• Agenda setting/sharing and list of attendees for each appointment typically happens after schedules are set and pre-forum prep begins.
• Chat feature available to share priorities with trading partners to help set agenda.
• Re-confirm all appointments one week out.
• Best Practices for Pre-Forum Preparation
• Onsite Meetings
• Post-Forum Follow-Up
• Gain insight, tips and tools to help you get the most out of your Forum experience
December-early January

• Meet with internal decision makers to decide strategy and review appointment list
• Review Manufacturer Company Profiles on Virtual Event Platform
• Review “Things to Share” outline and sample “Questions to Ask Trading Partners” (see slides 11-12)

January

• Develop and finalize Joint Meeting Agenda

February

• Immediately following the Partners Executive Forum, send all meeting notes, actions and/or agreements made at the conference to internal personnel for follow-up. Immediate follow up is critical to success.
• Schedule follow-up meetings
Team Involvement and Early Preparation

• Ensure all team members are clear on role and ownership.
• Start preparation and alignment early and prepare to course correct.

Strategic Partner Identification

• Segment partners by performance and opportunity.
• Allocate more time to most strategic partners.

Communication and Clarity

• Share critical information prior to meeting to drive alignment.
• Ask questions of partners to sharpen focus ahead of meeting.
• Suppliers need to understand distributor markets and focus areas.
1. Current State of Business
   a. Sales trend metrics
   b. Performance scorecard
   c. Status of current initiatives / joint opportunities

2. Goals of Forum Meeting
   a. What you hope to achieve coming out of the Forum
   b. Who will be attending

3. Strategies
   a. Organizational strategies relevant to partner
   b. New products and/or capabilities relevant to partner
   c. Opportunities that could mutually beneficial
   d. Market specific insights and strategies
1. What are your goals for our meeting at the Forum?

2. (If new partnership) What is the background of your organization as well as your overall strategy and focus?

3. How has our performance been over the last year as compared to other partners? 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? How do you view us fitting into 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?
Meeting and Discussion Format

- Both groups have strong feelings on ownership
- Meeting needs to be two-way discussion
- Top suppliers and distributors are prepared, organized and listen

Focus on Strategy and Big Ideas

- Capitalizing on big ideas and joint initiatives with biggest returns
- Handling of issues should be completed prior or separately

Decision Making vs Discussion

- Make key decisions that drive alignment and commitment
- Decision makers must be in attendance and willing to commit
Timing and Focus Is Key to Follow-Up

- Immediate follow-up is critical for execution and ROI
- Team members need to have clear follow-up plans, tracking and results process
- Follow-up process includes reviewing notes and creating follow-up matrix

Ownership of Follow-Up

- Consistent feedback that manufacturer owns process at all levels
- Follow-up begins with assigning initiatives to specific owners
- Opportunity to coordinate more with partners
- Tracking and reporting back on specific initiatives
• Dec 1 – Webinar/Virtual Program Tutorial and Walk-through
• Dec 7 at 11 am (ET) – Scheduling Platform Opens for Distributors, Platinum and Gold Partners
• Dec 9 at 11 am (ET) – Scheduling Opens for Silver Partners
• Dec 10 at 11 am (ET) – Scheduling Opens for everyone

SAVE THE DATE
2022 IFDA PARTNERS EXECUTIVE FORUM
January 30-February 2, 2022
Ritz-Carlton Grand Lakes
Orlando, FL
How can we help you and your team have the most productive and effective Partners Executive Forum experience?
YOUR IFDA CONTACTS

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