

1



Prepare Your Technical Logistics in Advance

- Ensure you have strong Wi-Fi connectivity or use ethernet
- Plan for a back-up for Wi-Fi failure (eg: tether to phone or use phone)
- Choose your platform (Zoom, Teams etc.) and familiarize yourself with the format
- Become accustomed to seeing yourself while presenting
- Practice (eg: if using slides ensure you know how to share screen in your platform of choice)
- If possible, consider having a colleague attend all meetings with you to take notes

2



Structure Your Day

- Yes, take advantage of the fact that you will not spend time looking for and getting to your next meeting but...
- Don't overbook your day
- Build in breaks to: **Nourish yourself | Get up and stretch | Review meeting notes and follow-ups | Prepare for next meeting(s)**
- Be aware of time zones (eg: Europeans will be tired towards day's end as they will have been at it 5-9 hours longer than you)

3



Set Meeting Objectives

- Identify and set objectives/outcomes for each meeting
- Structure your presentation and discussion around those objectives

4



Structure and Practice Your Presentation

- For 30 minute meeting devote 10-15 (max) minutes to slide presentation
- Use presentation to cover key areas (science, objectives, strategy, team)
- Don't dive too deep on science, particularly if it is at the expense of communicating about the company and its comparative advantage(s)
- Tailor your presentation for each meeting (**see #5 and #6**)
- Look for opportunities to 'connect' with investor but do not let it dominate/derail the business of the meeting

5



Do Your Homework

- Know who (person) and what (company) you are meeting with
- Know their areas of interest/expertise
- Know what they have already invested in
- Assess why and how an investor/pharma would want to invest in your company

6



Stand Out : Define and Differentiate Yourself

- Know your competition and how you compare your competition
- Effectively communicate the differences
- Know your unique value and communicate it honestly- do not over promise
- Know your company's marketplace and how you fit-in/stand-out
- Don't try and be something you are not - stick to your knitting (eg: **see #9**)

7



Don't Swing for the Fences in Every Meeting

- Read body language and feedback
- Know and accept that some meetings are the start of a longer process
- Identify the follow-ups to facilitate the longer process

8



Narrow the Follow-Ups

- No is not always bad: all meetings can be useful even if for some the usefulness is to get to a 'No' quickly
- Triage, focus and follow-up on those meetings that do present the opportunity to move forward (**see #10**)

9



Beware the COVID Trap

- The oncology focused company of the past 10 years should not look to become the new COVID company at BIO
- But, know and communicate what your company will be in the post-COVID-19 market
- Understand the challenges of moving forward during COVID (eg: delay in milestones due to lab closures) and communicate how your company will successfully navigate the obstacles to progress
- Stay focused on your science and strategic objectives

10



The Art of the Follow-up

- Agree to follow-ups before the close of the meeting
- Be prompt to follow-up on any agreed to items - **On this, it is helpful to bring to the meeting a colleague who can take notes and aid in the follow-up process. Use your breaks to compare notes/follow-ups**
- For follow-ups - **Be polite, respectful but persistent (find a way to work your way onto an investor's 'front page' or 'top three')**