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*Mentoring Guide*

# *The Professional Meeting Guide*

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Some detailed, practical advice on external, in-person, business meetings.

By Jim Robell

*Special thanks and sincere appreciation to Carter Gray.*

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# Introduction

## Preparation, Presence, and Respect

Success in business meetings rarely comes from improvisation. It comes from preparation, awareness, and respect for the people in the room. Whether meeting in person or over video, professionals who prepare their route, understand the purpose of the meeting, arrive early, listen carefully, and treat every participant with respect consistently stand apart from the rest.

The following practical guidelines are simple habits that signal professionalism, build trust, and help ensure that every meeting moves toward a clear outcome.



## Bring everything you may need:

- Enough copies of your presentation for everyone attending, plus extras
- Clean, crisp business cards
- Notepaper for detailed notes
- At least two writing instruments

In some cultures, business cards carry particular importance. In Japan, for example, the business card is often seen as an extension of one's professional identity.

Finally, be clear about your role and the goal of the meeting before you arrive. Know why you are there and what outcome the meeting should produce.



## Preparing for the Meeting



Professional meetings begin long before you walk into the room. Preparation demonstrates respect for the other party's time and shows that you take the meeting seriously.



If you are not completely sure of the location, consider driving the route the night before. This allows you to familiarize yourself with construction, detours, and the general driving path. It also helps you estimate realistic travel time, which is often much longer during rush hour.



While scouting the area, note the appropriate entrance, parking locations, and any nearby coffee or food options where you might meet beforehand or wait if you arrive early.



If security personnel see you or if someone you are meeting happens to notice you the night before, it is rarely an issue. In fact, it simply shows preparation.



Always aim to arrive early. Being late signals disrespect for the other party's time. If circumstances beyond your control will make you late, notify the other party as soon as you realize it. Professionals communicate delays immediately.



Dress slightly more formally than you think necessary. It is far better to be a little overdressed than too casual.



# First Impressions Matter

First impressions often form within seconds, and small details matter. The way you greet someone, carry yourself, and engage during introductions immediately communicates professionalism and respect.

These early interactions set the tone for the meeting and can strongly influence how others perceive your confidence, credibility, and attention to detail.



When someone enters the room whom you have not met before, stand and greet them. If appropriate, offer your business card at the proper time during the introduction.



Provide a firm but respectful handshake. For men, avoid both the overly aggressive grip and the weak “wet noodle” handshake. For women, offer a gentle handshake when appropriate. As always, read the room and adjust your approach to the situation.



Repeat a person’s name back after hearing it, and write it down as soon as possible. If a name might have multiple spellings, ask how it is spelled. If you did not clearly hear the pronunciation, politely ask them to repeat it so that you can get it right.



Avoid actions that could unintentionally signal disrespect. For example, do not immediately wipe or wash your hands after shaking hands with someone. While it may be unintentional, it can easily be perceived negatively.



If you collect business cards from multiple participants, place them on the table in the order people are seated or create a quick reference sheet so you can easily remember names during the discussion.



Silence your phone before the meeting begins (or better yet, don’t bring it.) and/or keep it out of sight unless it is required for the discussion.



Remember that there are no unimportant people.



People appreciate this effort because it shows respect and genuine attention.

# Professional Conduct During the Meeting



Once the meeting begins, focus on awareness, listening, and professionalism.



At the start of the meeting, confirm how long key attendees are available to participate. This helps ensure that important topics are addressed while decision makers are present.



If you arrive early and are waiting for others to join, simple conversation topics such as the weather can be helpful. The weather affects everyone, is rarely divisive, and can help establish a relaxed tone without becoming intrusive.



Speak clearly with confidence and a positive tone. Avoid trailing off at the end of your statements.



Avoid speaking over others. Listen carefully and encourage participants to share their thoughts. Understanding their perspective is far more valuable than simply telling them what you know.



Take detailed notes during the meeting. Capture tasks, decisions, action items, owners, and due dates. Flag these clearly in your notes so they can be reviewed later.



It is perfectly acceptable to say you do not know the answer to a question. Simply acknowledge it and commit to following up with the correct information.



And when you receive a clear “yes” during a sales discussion, stop selling. Nothing improves after that point, and continuing to push can sometimes talk you out of a deal.

## Professional Conduct During the Meeting

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Once the meeting begins, professionalism is reflected in how you communicate, listen, and engage with others in the room. Clear communication, active listening, and thoughtful participation help keep the discussion productive and respectful.

The habits above help ensure that the meeting stays focused and that every participant feels heard and valued.



# Professional Courtesy

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Small gestures of respect can make a lasting impression.



Always respect the property and environment of the organization you are visiting. Walk on sidewalks and designated paths rather than across landscaping or grass.



Be mindful that every person present contributes to the organization in some way. Treat administrative staff, assistants, security personnel, and junior team members with the same respect you would show senior leadership.



Professionalism is measured not only by what you say, but by how you treat everyone around you.



Professionalism is often reflected in the small details that show respect for others and their environment. Simple gestures, awareness of surroundings, and consideration for everyone present contribute to a positive and respectful atmosphere.

These habits reinforce professionalism and help build lasting professional relationships.



# Video Meeting Considerations

While many of the same principles apply to video meetings, the virtual environment introduces additional considerations. Preparation, technical readiness, and awareness of how you appear on screen all contribute to a professional and productive discussion.

With a few simple habits, video meetings can be just as effective as in-person conversations.

- ✓ Many of the same principles apply to video meetings, but a few additional considerations are important.
- ✓ Never wait until the last minute to connect to the meeting platform. Log in early so that any technical issues can be resolved before the meeting begins.
- ✓ If the video platform is new to you, install and test it at least a day in advance.
- ✓ Ensure that you know how to share your screen and present your materials. If you send a digital version of your presentation beforehand, consider sending it as a PDF. PDF files are smaller, cleaner to view, and more difficult to alter or copy than editable presentation files.
- ✓ When presenting, use your original presentation software if possible so animations and formatting display correctly.
- ✓ Be mindful of your background. It should be clean, orderly, and neutral. Avoid political imagery, distracting environments, or items that could be interpreted as commercially competitive.
- ✓ Finally, watch for subtle cues. Participants may unmute themselves, raise a hand, or use visual body language to signal they wish to speak. Staying attentive to these signals helps maintain a smooth and respectful discussion.



# Closing The Meeting

A well-run meeting should end with clarity and shared understanding. Taking a few moments to review key decisions, responsibilities, and next steps ensures that everyone leaves the meeting aligned and prepared to move forward.

A clear and professional conclusion helps to not only bring clarity, but also to turn discussion into action.



Before concluding, review the action items captured in your notes. Confirm responsibilities, owners, and due dates with the group. During the discussion, responsibilities may have shifted or timelines may have changed, so verifying them ensures everyone leaves with the same understanding.



Clearly identify the next steps and determine when the group will reconnect.



As the meeting concludes, try to say goodbye to each person individually using their name. Avoid getting someone's name wrong, as this can leave a negative final impression.



Within 24 hours, consider sending a brief follow-up summary confirming the decisions made, the assigned responsibilities, and the agreed timelines. This reinforces professionalism and ensures accountability.



## About the Author



James "Jim" Robell is President and Chief Executive Officer, Chairman of the Board of Fortior Solutions. He joined Fortior Solutions in 2002 after serving 19 years at Intel Corporation. He was promoted to President and Chief Operating Officer in 2005 after having served three years as the company's Vice President of Marketing, where he created the RAPIDGate® and RAPID-RCx® brands. In 2017, the board unanimously appointed Jim to the position of President and Chief Executive Officer, and in 2018, he was unanimously made Chairman of the Board. Fortior Solutions has helped protect more than 150 United States military facilities and processed more than 1 million people through the RAPID-Gate program. The RAPID-RCx program has scanned more than 500 million credentials. Together these programs have accurately and securely identified more than 50,000 people trying to enter military and critical infrastructure facilities with unsuitable backgrounds, forged or expired credentials, and assumed identities. In March 2020, Jim was featured on the cover of Enterprise Security, and in 2025 he and three others were awarded U.S. Patent # 12,417,449 titled, "Technologies for creating and transferring non-fungible token-based identities".

Prior to his tenure at Fortior Solutions, Jim was an executive at Intel Corporation serving in a variety of roles including technical, sales and marketing positions. Notably, he founded and served

as Director of Intel's worldwide Application Design-in Centers, Worldwide Intel Customer Support, Worldwide Crisis Management, the Y2K rollover and the Worldwide Intel Architecture Sales Campaign. Several of his technical articles have been published in Intel publications and he has been a keynote speaker in several capacities. Jim's technical background strengths include active radio frequency identification, mainframe architecture, micro-processor, microcontroller, development tools, embedded and proprietary networked operating systems.

Jim has received numerous awards throughout his career, and in 2017 he was honored on behalf of SureID, with the prestigious "Semper Fidelis" award from the Marine Corps Scholarship Foundation. Jim currently sits on various boards, holds various clearances, is certified in Best Practices for Anti-Terrorism Security by the Department of Homeland Security, is an authorized user of Chemical-terrorism Vulnerability Information by the Department of Homeland Security and has significant experience working with members of Congress, their staffs and lobbyists. Jim has also been a keynote speaker during the Central Intelligence Agency's industry day. In 2015, he was recognized by Dr. Reginald Brothers, Under Secretary of the Department of Homeland Security for Science and Technology as a Subject Matter Expert for the Passenger Screening Recommendations Task Force and served on the respective industry panel. In 2024, Jim was nominated for the Homeland Security Today Hero Awards, Homeland Security Person of the Year – National. He has also served as a member of the Governor's Economic Development delegation for North Dakota in partnership with Norway.

Jim has received several recognitions for his work with youth sports and the Camp Pendleton Armed Services YMCA. He also has been a strong supporter of a number of charities including the Susan G. Komen® Race for the Cure, the Make-A-Wish Foundation® and Washington County Kids (WCK).