When to Meet in Person vs. Virtually?

At Imparta, we've identified five situations in which it makes sense to try and meet customers in person, rather than virtually.

1. **Occasion.** Aim to meet in person when the occasion is a moment of truth for the account, when the impact is more important than how quickly it can happen. These moments of truth happen at each stage of the customer's Buying Cycle, from early chemistry meetings, to pitches, quiet conversations to frame the negotiation, onboarding and key business reviews.
2. **Customers.** Meet your customers in person is when you have a smaller number of customers, so that effectiveness is more important than efficiency.
3. **Relationship.** Meet in person when you need to build (or re-build) trust and rapport with your customer stakeholders.
4. **Interaction.** When the discussion needs to be intense, creative and/or deeply collaborative, that can be easier to do in person, despite the power of technology. The same is true, of course, if your job actually requires you to interact with the customer's equipment, on site.
5. **Information.** If the information you need to cover is complex, subtle or nuanced, a more free-flowing in-person meeting, which includes opportunities for informal discussions as well, will tend to work better.

Finally – it's OK to meet in person simply because you need the social contact! It's an important part of your mental health, and that's something you need for yourself, but also to do your job well.

Use this checklist to decide whether you should aim to meet in person, or virtually.

AREA	ISSUE	IN-PERSON WHEN...	✓	VIRTUAL WHEN...	✓
Occasion	Importance	Moments of Truth', e.g. first meetings, pitches		Tactical meetings e.g. regular sales calls; progress reviews	
	Priorities	Impact, i.e. few distractions and misunderstandings		Timing - Elapsed time before meeting happens	
Customers	Number	Few customers and/or meetings; effectiveness is key		Many customers and/or meetings; efficiency is key	
	Stakeholders	Small number of stakeholders, present together		Larger number of stakeholders or geographically dispersed	
	Values	In-person/social		Virtual/environmental	
	Location	Close and customer is present in the office		Distant or customer works from home	
Relationship	Rapport	Need to build trust & rapport		Trust & rapport already exists	
	Stability	Competitors trying to undermine you		No-one else is 'raising the bar'	
Interaction	Discussion	Intense; creative; collaborative		Informational; straightforward; question-based	
	Power	Power is balanced or in your favour		Power lies with the customer (e.g. negotiation)	
Information	Type	Complex; subtle; nuanced		Simple; direct; fact-based	
	Enablers	Informal, e.g. in the coffee area/at the bar		Formal, e.g. In the meeting itself	
		TOTAL		**TOTAL**	

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