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# Executive Meeting Playbook

How to get in the room, own the agenda, and walk out with a decision.

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<b>Who this is for</b>	B2B eCommerce practitioners who need to present to leadership — VPs, CFOs, CEOs — and want to walk in prepared and walk out with a yes.
<b>What you'll get</b>	A practical, step-by-step playbook for the full executive meeting arc: before, during, and after. Real tactics, not theory.
<b>How to use it</b>	Read it once end-to-end. Then use the section checklists before your next exec meeting.

Part of the **B2BEA Career Acceleration Kit** — tools for B2B eCommerce practitioners moving from execution to leadership.  
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# The Reality Check

Why most practitioners struggle in the exec room — and how to change that

You know your program better than anyone in that room. You've got the data. You've done the work. But getting execs to act on what you know is a different skill — and nobody teaches it.

Most practitioners go into executive meetings in one of two modes:

- **Status reporter:** Here's what we launched, here's our traffic, here's what's in the roadmap.
- **Feature requester:** We need budget for X, we need headcount for Y, we need the team to prioritize Z.

Neither works. Status reporting doesn't move decisions. Feature requesting feels like asking for favors. What executives respond to is a different framing entirely:

***"Here is a business opportunity. Here is what it's worth. Here is what we need to capture it. Here is the cost of waiting."***

That's the frame this playbook teaches you to build. Every section maps to a specific part of the exec meeting — from getting on the agenda through closing for a decision.

## The 5 Sections of This Playbook

01	Getting on the Agenda	How to get executive time — and make it count
02	Opening the Meeting	The first 90 seconds. What to say and what not to say.
03	Presenting the Business Case	How to translate your program into revenue and margin language.
04	Handling Objections	The 5 most common executive objections — and how to handle each one.
05	Closing for a Decision	How to end the meeting with a clear outcome — not a follow-up.

## 01 Getting on the Agenda

Executive time is the scarcest resource in your company. The way you ask for it — and the way you frame what you want — determines whether you get 15 minutes or 45, and whether those minutes go anywhere.

### Who to Ask

The right ask depends on what you actually need:

- **Budget or headcount:** You need the person who owns P&L — CFO, CEO, or division president. Not your direct boss's boss.
- **Strategy alignment:** VP of Sales, VP of Operations, or Chief Revenue Officer depending on your company structure.
- **IT/tech prioritization:** CTO or VP of IT. Come with a clear ask, not a wish list.
- **General program visibility:** A leadership team meeting slot or quarterly business review. Ask your manager to add eCommerce as a standing agenda item.

### How to Ask

Don't ask for a "meeting about eCommerce." Be specific about what you need and why it matters to them:

*"I want to show you a revenue opportunity we can capture this year — and what we need to act on it. Can I get 20 minutes on your calendar?"*

### The Pre-Meeting Brief

Send a one-paragraph brief 24–48 hours before the meeting. Not a deck — a paragraph. It should answer three questions:

- What's the opportunity or issue?
- What decision or input do I need from you?
- What's the cost of not deciding?

*This brief serves two purposes: it primes the exec before you walk in, and it forces you to crystallize your own ask.*

### Section 01 Checklist

- Identified the right decision-maker for this specific ask
- Framed the meeting request around a business outcome, not a topic
- Sent a one-paragraph brief 24–48 hours in advance
- Confirmed the meeting has a clear purpose and intended outcome
- Prepared a single-sentence answer to: "What do you need from me?"

## 02 Opening the Meeting

You have 60–90 seconds to set the frame for the entire conversation. Most practitioners waste it on pleasantries, preamble, or a slow-rolling agenda overview. Don't. Lead with the headline.

### The 4-Part Opening

01	<b>The Opportunity</b>	"We have a revenue opportunity of [\$ amount] sitting in our digital channel that we're currently not capturing."
02	<b>The Gap</b>	"Right now, [X%] of our customers are transacting digitally. Industry leaders are at [Y%]. That gap costs us [\$ amount] per year."
03	<b>The Ask</b>	"Today I want to show you three things we can do in the next 12 months to close that gap — and what we need to do it."
04	<b>The Decision</b>	"At the end of this conversation, I'm going to ask you to decide on [specific ask]. That's the only thing I need today."

### What Not to Do

- **Don't start with the agenda.** They can read. Start with the point.
- **Don't apologize for taking their time.** You earned this meeting. Act like it.
- **Don't lead with features or technology.** "We implemented product search" is not a business opening. Revenue is.
- **Don't over-explain the background.** If they need context, they'll ask. Assume intelligence.

### Reading the Room in the First 2 Minutes

Pay attention to early signals. They tell you how to calibrate:

- **They're nodding:** Keep going, you're landing. Stick to your plan.
- **They're checking their phone:** Slow down. Ask: "Is this the right level of detail or would you rather I jump straight to the ask?"
- **They jump in with a question:** Answer it directly, then return to your frame. Don't let a single question derail the arc.
- **They push back immediately:** That's engagement. Don't get defensive. Say: "That's exactly what I want to address — can I show you the numbers first?"

### Section 02 Checklist

- Practiced the 4-part opening out loud — not just in my head
- Opening leads with \$ opportunity, not with features or activity
- The decision I'm asking for is stated in the first 90 seconds
- Removed all preamble and "table-setting" from the opening
- Prepared a short answer to the most likely interrupting question

## 03 Presenting the Business Case

Executives don't buy features. They buy outcomes. Your job in this section is to translate everything you know about your program into the language of revenue, cost, and risk.

### The Three Numbers Every Exec Wants

<b>Revenue Upside</b>	What's the \$ revenue opportunity if we succeed? Show the math: adoption rate × customers × AOV × order frequency.
<b>Cost Savings</b>	What's the efficiency gain from shifting orders to digital? Phone/email orders cost \$25–40. Digital orders cost \$5–12. Multiply by volume.
<b>Cost of Inaction</b>	What do we lose each month we don't act? Quantify the gap. Competitors moving. Buyers expecting digital. Each month of delay is a number.

### Structure Your Case in 5 Slides or Less

If you're presenting a deck, five slides is the limit for an exec audience. More than that and you're managing slides, not the conversation.

- 1. Where we are today.** Current digital adoption, revenue, and cost baseline. One number per metric. No tables.
- 2. The opportunity.** What's possible in 12–36 months if we execute. Show the gap between now and achievable.
- 3. Our strategy.** Three things we're going to do to close the gap. Not features — outcomes.
- 4. What we need.** Budget, headcount, or decision. One specific ask. Defend it.
- 5. The ask.** What you need today, by when, and why it matters. This is not a recap — it's a close.

### Using Data Without Losing the Room

Data is your credibility — but too much of it is a wall. A few rules:

- One number per point. If you have ten stats, pick the three that matter most to this audience.
- Anchor every number to a business outcome. "Digital adoption is 22%" means nothing. "22% digital adoption means 78% of our orders still cost \$32 each to process" lands.
- Know your assumptions. If they ask how you got to a number, you should be able to explain it in one sentence.
- Have the detail in your back pocket. Bring the full model. Don't show it unless asked. Having it signals rigor without drowning them in it.

### Section 03 Checklist

- Business case leads with \$ revenue opportunity, not platform features
- Cost savings calculation is in the deck (digital vs. offline cost per order × volume)
- "Cost of inaction" is quantified — not just implied
- Deck is 5 slides or fewer
- Every stat is connected to a business outcome, not just reported
- Full financial model is available but not in the main presentation

## 04 Handling Objections

Objections are not rejection. They're engagement. An exec who's pushing back is paying attention. The goal is not to win an argument — it's to address the real concern underneath the objection.

### The 5 Objections You'll Hear — and How to Handle Them

#### 1. "We don't have budget for this."

*The real concern: Is this the best use of constrained resources?*

"I understand — that's why I built a cost savings model. At our current digital adoption rate, we're spending an estimated \$[X] per year more than we need to on order processing. This investment pays for itself in [Y] months. I'd like to show you that math."

Don't argue for budget. Reframe the investment as cost reduction or revenue recovery.

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#### 2. "Our customers aren't ready for digital."

*The real concern: We tried before and it didn't work / I'm not sure our buyers want this.*

"That's worth looking at directly. We have [X] accounts transacting digitally today. The ones that adopted are ordering [frequency] times per year vs. [Y] times for offline customers. The data suggests the appetite is there — the question is how we activate the rest."

Come with your own adoption data. If you don't have it yet, acknowledge the gap and propose a pilot to find out.

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#### 3. "This isn't a priority right now."

*The real concern: There are competing initiatives and I'm not sure this one ranks.*

"I hear you on prioritization. Here's my concern: every month we delay, [\$ amount] in potential cost savings and [\$ amount] in addressable digital revenue goes unrealized. I'm not asking you to make this the top priority — I'm asking for [specific resource] to keep momentum."

Make the cost of delay concrete. Then make a small, specific ask — not the whole roadmap.

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#### 4. "IT can't take this on right now."

*The real concern: Resource constraint is real and I can't force IT to prioritize this.*

"I've actually been working with [IT contact] on sequencing this. The pieces I'm asking about today don't require heavy IT lift — they're primarily [platform configuration / content / process]. The IT-dependent pieces are further out in the roadmap. Can I walk you through what I need in the next 90 days?"

Break your ask into IT-dependent and non-IT work. Push the heavy lift to later. Make the near-term ask easy to say yes to.

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#### 5. "Can't we just do this internally?"

*The real concern: I don't want to bring in an agency or pay for outside help if we can avoid it.*



"Absolutely — here's what I've mapped out for what we can do in-house vs. where we need help. [Internal capacity] covers [X]. The gap is [specific skill/time] that we don't have right now. The cost of getting it externally is [\$ amount] — and the alternative is [delay / missed revenue]. I want to do as much internally as possible."

Show that you've already considered the internal-first path. Come with a specific gap analysis, not a vendor preference.

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#### Section 04 Checklist

- Prepared a response to all 5 objections listed above
- "Cost of delay" is quantified and ready to deploy
- Have a small, specific ask ready if the bigger one gets blocked
- Practiced objection responses out loud — not just in notes
- Know the difference between an objection and a disqualifier (stop pushing if it's the latter)

## 05 Closing for a Decision

Most exec meetings end in ambiguity. "Great conversation, let's stay connected." "Send me that deck." "Let me think about it." Those are not outcomes — they're polite delays. Your job is to close for a specific, time-bound decision.

### What "Closing" Actually Means

Closing for a decision doesn't mean pressure tactics. It means being clear about what you need and making it easy to say yes:

- A specific decision — not "support" or "buy-in" but a concrete action.
- A clear timeline — not "when you have time" but "by end of quarter."
- A minimal ask — if the full ask is too much, have a smaller version ready.

### The Close Framework

<b>Summarize</b>	"We've covered a lot of ground. To recap: we have a [\$ amount] opportunity, our strategy is [3 things], and we need [specific resource] to execute."
<b>State the Ask</b>	"What I'm asking for today is [specific thing] — [budget amount / headcount decision / prioritization call] — by [date]."
<b>Address the Risk</b>	"If we move on this now, we can [outcome] by [date]. If we wait, we lose [specific thing] — and it gets harder to close the gap."
<b>Ask for the Decision</b>	"Are you comfortable approving this today? If not, what do you need to get there?"

### When You Don't Get the Yes

Not every meeting ends in a decision. That's okay — as long as you leave with a clear next step:

- **"Let me think about it."** → "That's fair. What information would help you decide? And when would you like to reconnect?"
- **"Send me the deck."** → "I'll send it today. Is there a specific question you want me to address in the follow-up?"
- **"Talk to [someone else first]."** → "Happy to. Can you make the intro? And should I loop back with you after that conversation?"
- **"Not right now."** → "I understand. Can we agree on a timeline to revisit? I'd rather come back with updated data in 60 days than let this drift."

## The Post-Meeting Follow-Up

Send a 3-sentence email within 2 hours of the meeting ending. Not a deck. Not a wall of notes. Three sentences:

***"Thanks for the time today. To confirm: you've agreed to [decision / next step] by [date].  
I'll [action you're taking] and will follow up on [date]."***

This email does three things: it confirms the agreement on record, it makes the timeline explicit, and it signals that you're following through. Most people don't send it. The ones who do stand out.

### Section 05 Checklist

- The specific ask is written down before I walk in — not improvised
- The ask includes a decision, a dollar amount (if applicable), and a date
- A smaller fallback ask is prepared in case the full ask is blocked
- Post-meeting follow-up email is drafted in advance (fill in the blanks after)
- "What do you need to get to a yes?" is in my mental toolkit

# Master Pre-Meeting Checklist

Run through this before every executive meeting

Use this as your final 10-minute prep before walking into any executive meeting about your eCommerce program.

## THE SETUP

- I know the name and role of every person in the room
- I sent a pre-meeting brief 24–48 hours in advance
- I've confirmed the decision I'm asking for
- I've reduced my deck to 5 slides or fewer

## THE NUMBERS

- Revenue opportunity is quantified (\$ amount)
- Cost savings are quantified (digital vs. offline cost per order x volume)
- Cost of inaction is quantified (\$ per month or quarter)
- Full financial model is in my back pocket — not in the deck

## THE OPENING

- My first sentence leads with the business opportunity, not an agenda
- I've stated the specific decision I need in the first 90 seconds
- I've removed all preamble and throat-clearing from the opening

## THE OBJECTIONS

- I've prepared a response to "no budget"
- I've prepared a response to "customers aren't ready"
- I've prepared a response to "not a priority"
- I have a smaller ask ready if the main ask gets blocked

## THE CLOSE

- My close includes: specific ask + dollar amount + date
- Post-meeting follow-up email is drafted and ready to send
- I know the answer to: "what do you need to get to a yes?"

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