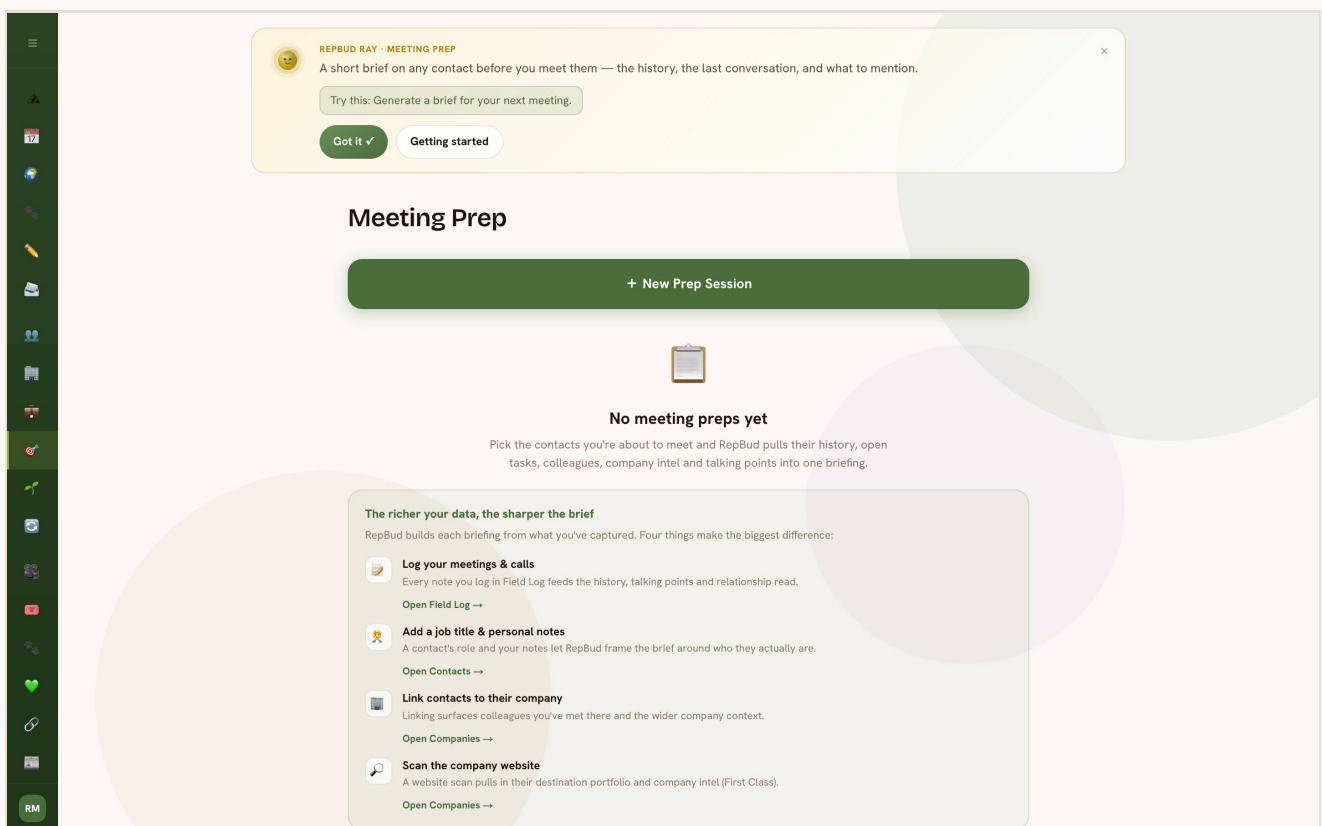


Meeting prep briefs

Before you walk into a meeting, RepBud pulls everything you know about that contact into one briefing — so you sound prepared, not scrambling.

Covers /dashboard/meeting-prep · for rep, dmc



The steps

01 Open Meeting Prep

From the sidebar, open Meeting Prep. Past sessions live here; tap How briefs work any time to see what makes a brief sharper.

02 Start a new session

Each brief is one prep session. Tap New Prep Session to begin.

03 Pick the meeting type

Choose how you're meeting — one-off, trade workshop, function, or trade show — then name it and set the date.

04 Choose who you're meeting

Search and tick the contacts you'll see. You can add more than one.

05 RepBud builds the brief

RepBud reads the contact's history, open tasks and company context to assemble the briefing.

06 Read the brief

The card shows a relationship-health read, what you last discussed, open tasks, talking points and a suggested opener — plus colleagues met and company intel where you've captured them.

07 Build an agenda

Tap the beside any talking point to add it to your agenda, then copy it out to take into the room.

08 After the meeting

When you're done, log how it went and add follow-up tasks — that history feeds an even sharper brief next time.

Next: Log a meeting in Field Log

Questions

Why does my brief look thin?

Briefs are built from what you've captured. If a contact has little logged history, no job title and no company link, the brief leans on company context. Log your calls and meetings, add their role and notes, and link them to their company to sharpen it.

What does the relationship-health chip mean?

It's a quick read — Strong, Warm or Needs attention — based on how recently and how often you've been in touch, to help you judge the tone going in.

Can I prep for more than one person in the same meeting?

Yes. Tick several contacts in the picker and RepBud builds a brief card for each one in the same session.

What's the agenda builder for?

Tap the beside any talking point to pin it, then copy the numbered agenda to your clipboard to paste into notes or take into the room.