Client Meeting Check-list

*Prepared by Giglio Co. – Steve Giglio - 2019*

Print this list prior to a new business or client meeting. Hit each point and you will increase your confidence as you build your reputation as their trusted adviser.

## Pre-meeting Preparation:

Review company web site: main pages, blogs, news releases, key executives

Research meeting attendees via LinkedIn and Google search

Google company news for last 6 months

Google the industry keywords for trends/news

Create and print out 7 probing questions (minimum)

Create agenda, assign specific time (not duration) for each item

## The Greeting

Arrive 15 minutes early (whether you are hosting meeting or they are)

Smile like you are hosting them in your living room

Confirm the meeting length, determine if there are hard-stop limitations

Measure the mood: inquire how their day is going so far

Get confirmation of the agenda

## Probing Conversation

Ask your questions with no expectation of their response

Initially keep the conversation ambiguous

Dive deep like a martini glass….wide perspective to more pinpointed

Repeat their answers periodically to affirm them and ensure understanding

Follow up their answers with “Really” a few times when you need more information

Synthesize their business goals and challenges, ask for confirmation

Introduce your recommendation if appropriate; Recommend a follow-up meeting if not

## Recommendation

State the primary goal of your recommendation

Be patient. Do not rush. Develop a rhythm to your idea

Answer their questions if they are appropriate to where you are in your recommendation. Otherwise state that you will resolve that issue once you advance to that point in your recommendation

## Closing

Summarize your points as they relate to their goals

Present your recommended next step

Be flexible and adapt to what they want next

Write down the agreed-upon next step

Genuinely thank them for their time; acknowledge the possibilities a partnership could produce

## Follow-up

Within 24 hours, send a recap email

Repeat a concise version of their goals and your recommendations

Note that you will follow up in a week

Analyze where your recommendation might be vulnerable to push-back and have an answer for each issue. Write them down so you are ready.

Find a key news article or other piece of content related to their business/your recommendation; sent it to them

If no response, send them another email after one week

If no response, call them. Continue calling until you connect