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