

Holding Successful First Meetings

Question

Can you provide any guidelines or rules for holding a successful first meeting with a prospective client?

Answer

Every long-term, trusted-advisor relationship began, sometime in the distant past, with a first meeting. The most important thing to remember is that great relationships start with a great conversation, not one person trying to show the other how brilliant he is. So another way of thinking about the challenge of first meetings is to figure out how to have an engaging conversation with the other person—one that leads them to want to have more conversations. A second important point is that even during a first meeting, where you are invariably going to have to build some “expert” credibility, you have to act like a trusted advisor and demonstrate qualities such as empathy, listening, big picture thinking, and personal trustworthiness. When you have an advisor mindset, in other words, you handle first meetings quite differently than if you have the expert mindset.

Here are some important guidelines for having great first meetings:

- **Get an Advance on second meeting** ~~Prepare in advance for second meeting~~ Come that people often show up woefully unprepared for meetings with them. Find out everything you can about the person you are meeting and the company. Talk to others who know them.
- Make sure you know who is actually going to be there. Don't bring more than one person more than the client will have at the meeting.
- Identify a possible agenda in advance. Call the other party to discuss this ahead of time.
- Focus on achieving 4 goals:
 1. **Create rapport:** What do you have in common? How can you connect on a personal level?
 2. **Understand their issues:** What are this person's most important business goals and issues? Personal goals and issues?
 3. **Build your own credibility:** You do this by giving examples, sharing experiences, asking good--even provocative--questions, and sharing ideas and experiences in the conversation—not by reciting your resume and degrees!
- Always *Show* rather than *Tell*. You show by sharing examples, case studies, findings, best practices, etc. You tell by reciting facts (“We have 40 offices”) or making assertions (“We're the best”).
- Evoke curiosity. Your aim is to create “reach”—to have the other person reach out to you about something they are intrigued with. Give them a good reason for a second meeting!
- Don't sell. No one likes to be sold to. Create a buyer by adding value in the meeting, asking thoughtful (open-ended) questions, evoking curiosity, demonstrating commitment to invest in a relationship, and showing a passion to help them.
- Eliminate the PowerPoint. It's better to draw on a piece of paper, whiteboard, or flipchart during the meeting. Written material should be a leave-behind.