

Building Trust With New Executives: Self Assessment

<i>Rate how you handled a recent meeting with a new executive contact (at either an existing or new client)</i>	1 Weak or Absent	2 OK (But Could Improve)	3 Well Done
Client name: _____			
Pre-Meeting			
Discussed or corresponded about desired agenda			
Ascertained who will be there			
Clarified colleagues' roles for the meeting			
Developed meaningful "point of view" to share			
Selected 2-3 relevant client examples to talk about			
Researched company and executives			
Developed 3-5 thoughtful questions			
Held pre-meeting planning session			
Meeting			
1. Develop Rapport			
Used small talk as icebreaker			
Asked thoughtful personal questions			
Confirmed/re-set agenda and timing			
2. Build Credibility			
Used brief, relevant client examples (50-75 words)			
Shared points of view on markets, competition, etc.			
Asked thoughtful questions about key issues facing client			
Had open, candid, authentic demeanor			
Had a conversation instead of making a presentation			
3. Uncover Client Needs and Issues			
Asked about impact of trends and current events			
Highlighted issues that your other clients face			
Asked "intelligent" questions about their known strategy			
Ascertained urgency and payoff of the issue			
Confirmed client is economic buyer and "owns" the issue			
4. Get a next step			
Evoked client's <i>curiosity</i> to learn more			
Added "value for time" during the meeting			
Identified a value-added follow-up step for you			
Secured an action commitment from <i>them</i> as well			
Post Meeting			
Noted follow-up steps, summarized key points for client			
Debriefed with team and discussed what you learned			
Acted rapidly on follow-up			