

Holding Great First Meetings

<i>Rate Your Meeting</i> Client name: _____	1 Weak	2 Average	3 Well Done
BEFORE YOUR 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			
Identified your positioning objective for this client			
DURING YOUR MEETING			
Develop Rapport and Set the Agenda			
Used small talk as icebreaker			
Asked thoughtful, authentic personal questions			
Confirmed/re-set agenda and timing			
Build Your Credibility			
Able to effectively describe what is special about you/your firm			
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, natural demeanor			
Had a conversation instead of making a presentation			
Used examples, illustrations, client references to position you with the client, given the competitive situation			
Uncover Client Needs and Issues			
Asked about impact of trends and current events			
Highlighted issues that your other clients face			
Asked intelligent questions based on your research about their strategy, operations, and organization			
Asking agenda-setting and aspirational questions			
Ascertained urgency and payoff of the issue			
Confirmed client is economic buyer and "owns" the issue			
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			
AFTER YOUR MEETING			
Noted follow-up steps, summarized key points for client			
Debriefed with team and discussed what you learned			
Acted rapidly on follow-up			