

	PLANNING √	Post Meeting Assessment		
Checklist: Holding Great Business Development Conversations Client name: _____		1 Weak	2 OK	3 Well Done
PRE MEETING				
Discussed or corresponded about desired agenda				
Ascertained who will be there and clarified colleagues' roles				
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				
Develop Rapport and Set the Agenda				
Used small talk as icebreaker				
Asked thoughtful, respectful 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.				
Used credibility-building questions about key issues facing client				
Had a conversation instead of making a presentation				
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 pre-call research				
Asking agenda-setting and aspirational questions				
Confirmed client is economic buyer and "owns" the issue				
Develop the Need				
Learned who the key stakeholders are				
Asked about implications for the rest of the organization				
Ascertained urgency and payoff of 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				
POST MEETING				
Noted follow-up steps, summarized key points for client				
Acted rapidly on follow-up				