Initial Prospective Client Meetings Checklist

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How to cultivate prospective clients and get to a proposal: Meeting Preparation Tool

Introduction

Preparing for your first meeting with a prospective client will allow you to seem like an "effortless expert" and more easily identify and articulate what you could do to help them. Use the following checklist to prepare prior to your initial meeting or conversation. Allow adequate time to gather and think through relevant information. Although this checklist suggests that you create a brief "cheat sheet" of key topics or notes to prompt conversation based on what you find, make sure you follow the client's lead in the meeting or conversation.

Step 1: Conduct Research

The goal in this step is to gain a basic understanding regarding the person you are meeting with, their company, and any trends affecting their company or organization that you may be able to help them with.

Individual

- ☐ Conduct a search on the individual(s) you are meeting with. Search the Internet LinkedIn, and Twitter at minimum.
    - Especially look for anything they have written, quotes, references about them, awards, job changes or promotions, and videos of them speaking.
- ☐ If the individual(s) recently left a job/started new a job, conduct a brief search on the company they just left in case they reference it.
- ☐ Keep searches on the individual(s) to professional developments. Only bring up personal Facebook or Instagram details if you have a preexisting friendly relationship so as not to display fake intimacy.
- ☐ If you already have a personal relationship, refresh yourself on personal details, including spouse/partner name, children names and ages, where they live, hobbies/ interests, etc.

Company

You want to gain a current understand regarding what their company or organization is doing (e.g., their services and products, areas in which they are growing) as well as how they are doing (e.g., are they having sustainability problems, have they had any recent public relations issues, have they had any recent or significant turnover, or are their products and services aligned with industry trends?).

- ▫ Review the company or organization's website and materials, especially:
  - Current and new services and products
  - Leadership and Board members (if applicable), including vacancies and recent hires
  - Annual reports
  - Recent IRS filings (if non-profit)
  - Awards/recognition received
  - Press releases
- ▫ Conduct an Internet search for news on the company or organization, including accolades, challenges, public perception, and articles in which the President/CEO or staff are interviewed/quoted
- ▫ Conduct an Internet search on the company's main partners and competitors to understand their current state
- ▫ Conduct an Internet search for any open positions or clusters of open positions they have, especially leadership positions or positions related to an area in which they are growing.

Industry

- ▫ Research industry trends that may impact the company or organization currently or in the future, including:
  - Articles, commentary, or presentations in industry-related publications or websites
  - Thought leader blogs or videos on LinkedIn or other professional forums
  - Government/policy trends that impact the market or their services and/or products
- ▫ Look at other companies or organizations in the industry to identify their successes, challenges, market positioning, and trends

Step 2: Codify Learning

Next, create a "cheat sheet" with key points you want to remember for your meeting, including:

- Top 3 industry trends
- Top 3 positive developments/accolades for the company or organization
- Top 3 potential needs and/or issues for the company or organization determined by your research and expertise
- 3 to 5 questions for the client related to the points above
- 3 objections they may raise to you helping them.
- If you know them personally, the top 3 "non-business" conversation points

Step 3: Practice, Practice, Practice

Take your cheat sheet and practice saying aloud:

- Your initial greeting/opening, including your introduction of yourself and how you start the conversation after that
- Your description of industry trends and potential needs and/or areas of concern
- Your questions about the company or organization
- Your descriptions of how you could help them with potential needs and/or issues and responses you think they may give to your questions
- Your responses to their potential objections to you helping them