

STEP 1: Set the appointment

Introduce yourself	Make sure it's a good time to talk
Explain why you're calling	Offer the client their WIIFM – What's in it for me?
Schedule a meeting at the client's convenience	Suggest a specific time and work it from there Try to make it within a few days
Explain how you got their name, especially if it was a referral from a colleague	

STEP 2: Do your homework

Research the organization
Overall mission
Programs and initiatives
Budget allocations
Hot topics/current challenges and pressures
Organizational culture
Historical relationship with the Firm
Research the client you'll be meeting with
Professional history
Roles and responsibilities
Current challenges
Hot and cold buttons
Historical relationship with the Firm

STEP 3: Prepare meeting agenda

STEP 4: Conduct the meeting

Opening the meeting	Establish rapport by adapting to your client's style
Throughout the meeting	Manage the time against your objectives Listen actively Seek clarification of potential client needs/problems Determine and adapt to your client's style Observe your client's non-verbal cues Assess your client's interest/involvement
Closing the meeting	Summarize the meeting's conclusions and commitments Agree on next steps Arrange a follow on meeting & determine who needs to be included Thank the client for their time Give the client your business card Leave the client with materials that seem appropriate

STEP 5: Follow up after the meeting

Thank the client again for his/her time
Deliver on your promises for further information, meetings, etc.
Offer additional information as appropriate going forward
Determine if any additional Firm personnel are now need to get involved. If so, who, and what specifically would you like them to do? What information will they need from you?
Determine what information you need from the other parts of the Firm and how you can find it
Schedule additional meetings with the client and with additional Firm staff
Give everyone credit who helped prepare for the meeting with the client, even though not everyone may have been present during the meeting
Provide updated, relevant information to your team

Identify the right people, right number of Firm participants to attend

Determine your objectives for the meeting (“What do I want to get out of the meeting?”)

Formulate questions that match your objectives

Assess your ability to accomplish your objectives during the given time for the meeting

Anticipate your client’s concerns

Consider what next steps you might be able to offer and/or materials that you could leave with the client (“leave behind” items such as an executive summary or best practices matrix from unclassified client deliverables)

Determine roles and responsibilities during the meeting (a best practice is to have two staff)



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