Marketing Call Cheat Sheet

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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

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

STEP 3: Prepare meeting agenda (cont)

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)

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