

WEEK 4

Challenge: Hold a Great First Meeting

- ✓ First, read or listen to **Week 4: Master the First Meeting** in *It Starts with Clients* (pages 51-72 in the hardcover version)

Last week, you developed your calling lists of clients and prospects you want to meet with. This week, I want you to become a student of how to hold a great first meeting, and then use my planning and review tool to reinforce the right behaviors. There is a huge amount of important material in Week 4 of *It Starts with Clients*, and I strongly recommend you go through it twice.

Assignment

Develop your plan to hold a great first meeting

On the next page is a planning and review checklist called *Holding Great Executive Meetings*. Use it to plan an upcoming client development meeting (not an operational “report out” or delivery discussion). Then, afterwards, I would like you to use it to hold an “after action review” to assess how well you did on each of the five objectives.

Business development when you can’t meet in person

You may not be able to meet face-to-face with your prospect or client. So does this playbook go out the window? No—not at all. But, there are some things you may need to do a bit differently or emphasize more if you’re on the phone or using a video conferencing platform—for example:

- Be more conscious of how you use your voice: the speed with which you talk, your inflection and emphasis, your intonation, volume, and so on. When all you hear is the voice, “sameness” is monotonous.
- Break what would have been a long, in-person meeting down into several or more virtual conversations.
- Send material in advance of discussions. Voice or video-only reduces the communications “bandwidth” and having something in writing beforehand will help.

Holding Great Executive Conversations	PLANNING √		Post Meeting Assessment		
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 thoughtful questions					
Held pre-meeting internal planning session					
MEETING					
1. Build Rapport					
Used small talk as icebreaker					
Asked thoughtful, respectful personal questions					
Confirmed/re-set agenda and timing					
2. Establish Your Credibility					
Able to effectively describe what is special about 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					
3. Understand Their Agenda					
Asked about impact of trends and current events					
Highlighted issues that your other clients face					
Asked intelligent questions based on your pre-call research					
Asked agenda-setting and aspirational questions					
Confirmed client is economic buyer and "owns" the issue					
4. Go Deep and Add Value					
Learned who the key stakeholders are					
Asked about implications for the rest of the organization					
Ascertained urgency and payoff of the issue					
5. Get a next step					
Evoked client's curiosity to learn more					
Added "value for time" during the meeting					
Identified a value-added follow-up step for you					
Secured an action commitment from them as well					
POST MEETING					
Noted follow-up steps, summarized key points for client					
Acted rapidly on follow-up					