

Elements of Successful Client Meetings

- I. Rapport Building
 - A. Opening the dialog
 - B. Establishing peerage
 - C. Finding connections
 - D. Getting the client talking about themselves

- II. Building Trust
 - A. Confirm your credibility
 - B. Demonstrate your competence
 - C. Model your integrity
 - D. Essential mindsets

- III. Questioning
 - A. Finding out as much as you can about what they do and how they do it
 - B. Past, present, and future based questions
 - C. Seeking how you can be helpful to this person
 - D. Exploring what's possible

- IV. Listening
 - A. Obstacles to listening
 - B. Your actions: Confirm, clarify, take notes
 - C. What to listen for

- V. Story Telling
 - A. The purpose of stories
 - B. What kinds of stories to tell
 - C. When to use stories to escalate the sale
 - D. How to develop powerful, relevant stories

- VI. Getting to the second meeting
 - A. Reasons to come back
 - B. Requesting the meeting and scheduling the meeting
 - C. Escalating the sale
 - D. Presentation and proposal design