

## **Initial Prospective Client Meeting Success Strategies**

### **Sample: Client Meeting Interview Questions**

I use this form to guide my initial consultation with new coaching clients. It is not meant to be used as a questionnaire that they fill out. In fact, the client does not see this form. Its purpose is to help me recall questions to shape the project and scope of work. I consult this list to prepare for my first meeting with a new client so all my attention is then directed at listening -- listening to their responses, to their issues, to the opportunities, to the layers beneath what they are saying.

Client (or prospect) name:

Title:

Company:

Date and time of initial meeting:

What is your vision for your company?

Describe your company. What does it do?

What is the mission? What are the core values?

Any recent organizational accomplishments?

Current organizational problems or concerns?

What's it like to work here?

Describe your industry. How would you define the culture? Demographics?

Describe your job. What do you do? What is your personal mission? What are your core values? How many direct reports?

What are the toughest issues you currently face in your work?

Are these common to the organization, or unique to you?

What are your areas of greatest confidence/ strength?

In what areas would you want to increase focus?

What are your expectations, interests, wants, concerns?

What is your vision for your career?

What are your major commitments/ specific projects? By when?

What are the obstacles or roadblocks to achieving those commitments?

What do you really want?

What would it look like if you got that?

VALUE: What will you have to have gotten at the end of xx months to know that your \$\$ was well spent/ invested?

Why do you want a coach?

What are you hoping I can do for you?

What coaching style suits you best?

DETERMINE: what we'll focus on, structure, payment preference (pre-purchase or billing), homework, purpose, objectives. Protocol for billing your company/ getting paid?

How can I best serve you?

CALENDAR : how long are we initially going to work together? How frequently should we talk by phone? For what duration? How often should we meet in person?

What particular skill(s) do you want to focus on for your personal growth and development?

What do you want to do that you currently avoid doing?

How will you measure your results in this coaching arrangement? In other words, how will you know if you learned anything/ created what you wanted after this coaching period?

What are your goals for leadership coaching? What specific outcomes are you striving for in this partnership?

### **Client Meeting Reminders**

Just keep in mind when you are in client meetings:

- Frame your intention for yourself and the client,
- Set context,
- Establish peer status to create trust and rapport,
- State your intended outcome,
- Listen for and handle their objections,
- Align for value/clarify the value proposition,
- And ask for the business.

