

Client Name: _____

LOGISTICS

Date:	Time:	Meeting Length:
Location:		Contact/Meeting Coordinator:
Date Meeting Confirmed:		Date Room Materials Confirmed:
Members of my team in attendance:		

MEETING PURPOSE

What is the primary purpose of this meeting from your client's perspective?

What specific directive or expectations does the client have for this meeting?

ATTENDEES - Who will be in attendance? What are their meeting objectives?

Attendee	Title	Objective

OPENING COMMENTS

What will my Opening Comments be? (Will be different on initial calls vs. follow-up calls)

CREDIBILITY

What can I say / do to increase my credibility?

NEW INTRODUCTIONS

What new introductions are needed? (either on the client's team or your team)

SUMMARY OF YOUR UNDERSTANDING

What is your summation of the client's current situation and challenges?

State the purpose of the current meeting:

What has changed since the last time you spoke?

Confirm timeframe if previously established. Are you still shooting for date xx/xx/xxxx?

QUESTIONS

	Priority
Information Questions: What additional information do I need?	
Value-Add Questions: What questions can I ask that will stimulate and facilitate my client's understanding?	

ISSUES/CHALLENGES

	Impact	Priority
What are the client's issues/challenges? Have their priorities changed?		

METRICS

What metrics does the client use to measure their objective results? What are these results now? What do they want them to be? What is the value of the difference? What is the value over time?

Metric	Current Value	Desired Value	Value of Difference	Value Over Time

VALUE PROPOSITION / VALUE HYPOTHESIS

Why should this client see me now? What is my value hypothesis?

What tangible value can I bring to this client?

What are the metrics that measure the value I can bring?

What is the magnitude of the value I can bring?

What evidence do I have that I can help?

POSITIONING

What strengths do I bring to this opportunity?

What might the client consider to be my vulnerabilities?

CALL OBJECTIVES / ADVANCES

What is my primary call objective? (*Call Objectives should be: 1. Specific & measurable, 2. Center on the action the client will take, 3. Move the sale forward, 4. Be reasonable from the client's perspective*)

What is my Ideal Advance for this meeting?

Perfect Close phrase:

SECONDARY / BACKUP OBJECTIVES

What are my secondary/backup objectives?

-
-
-

What are my alternate/additional Advances for this meeting?

-
-
-

Perfect Close phrases:

-
-
-

MINIMUM ADVANCE

What is the smallest advance I am willing to accept and still move forward?

Perfect Close phrase:

BRING UNEXPECTED VALUE

What unexpected value can I bring to this meeting?