Doing the first meeting right

The first meeting with a prospective client, in person or by phone, is a critical moment. Define your goals and sequence your meeting well for maximum success.

Know your goal(s)

Your goals are shaped by what you know about the prospect and about what the prospect has already done. You'll want to:

1. Understand the size and scope of their problem
2. Qualify them as prospects; can you address their problem well and are they ready and able to pay?
3. Build a relationship with them
4. Have them decide they'd like to continue the dialogue
5. Get them to agree to next steps for you and for them to work on before you continue your dialogue

Define your meeting sequence well

Usually, you want the client to talk a lot (much more than you talk). You demonstrate your competence by how you listen, by the questions you ask, and by the value you deliver in the meeting itself. Here's a sequence that often works.

Introductions

If possible get the prospect to "go first." Say something like, "If you describe your situation, I'll be able to describe us in a way that will be most helpful to you." Describe yourself and your firm very briefly. Bring no paper or only a brief description on a single sheet of paper.

Ask good questions and listen to the answers

Prepare your questions ahead of time so you know what you are after, and then listen intently. Adjust your questions to fit into the flow. It's a conversation (not an interrogation) through which you get needed information and demonstrate your capabilities.

Listening is critical to relationship building. When you listen and reflect back what you have heard, they understand you are deeply interested in them and their situation

Deliver value to them (but not in the first half of the meeting time!!)
Your want the prospect to get value from this first meeting. You won't solve their problem in the first meeting (usually). But the prospect will evaluate your ability to help them meet their business goals. So contribute to meeting those goals with an insight that you have.

You can also show you can help with other needs. Help with something that comes up in a way that's easy for you to do and valuable for them. Being helpful outside your professional specialty builds a relationship and stimulates their appetite for continued contact.

But don't rush to be valuable. Many professionals are over-eager to show their brilliance and merit. They leap in without listening carefully enough or long enough, before they understand enough. You can be smart and valuable in the middle and end of the meeting: you don't have to do it right upfront.

Leave working together
By the end of the meeting, try to arrange for both you and they to have something to do to prepare for meeting again. Even if you have to write a proposal (and it is probably too soon for that if you can avoid it), make sure they also have something to do. If they are working on something and you are working on something, then magically you are already working together. Working together like this creates a great atmosphere for the continuing discussions about exactly what they need to do to address their problems and how you can help. (For more information on giving your prospects work to do, see this recent Business Development Tips for Professionals)

What to do this week

Think about a first meeting coming up. How will you do it differently than you have before?

What are these tips?

These monthly tips help professionals create more business and enjoy their work more. We focus on how to start relationships, how to build relationships, and how to convert those relationships into sales. Visit our archives to learn more.

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