

Customer Meeting Checklist

Instructions

Use this checklist to build your presentation for your customer meetings. Each section contains elements that you can put into your slide deck or other presentation to drive your conversation and discussion around product features and customer needs.

Common Statements

What statements or quotes do you want to provide customers to see which they identify with, or disagree with?

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Product Features

What are the names of the features or capabilities that you will show in your pitch?

Things to Remember

Here are some helpful reminders to keep at hand while you are in your customer meeting:

Introduce everyone and their roles to the customer.



Know the name and role of everyone you talk with.



Give the customer a chance to vent.



Remember the critical questions you need to answer.



Don't answer the customer's questions directly.

