Meeting Checklist

1. All decision makers have confirmed their attendance at the meeting.
2. The meeting is not in a cafe or public place.
3. Research their competitors and industry.

**Meeting Agenda**

1. Avoid excessive small talk, start talking about their business as quickly as you naturally can.
2. Make sure all decision makers are in the room before you start - otherwise offer to reschedule.
3. Let them know you have another meeting you need to get to so you have 45 minutes.
4. Ask them if it's okay to ask some questions and if it's okay to record it on your smartphone.
5. Tell them you have read the website worksheet they filled in and that you wanted to meet in person so you could go deeper.
6. Ask what it is they are trying to achieve with their new project.
7. Go wide on the answers - IE: Ask what else, what else, what else. Competitors? Industry factors? New products? Expansion plans?
8. Then ask what the most important objective is out of the ones they have mentioned.
9. Go deep on this objective - ask why and ask them to explain it in full detail. This may reveal what's really going on in the business.
10. Ask what success looks like in 12 months time to them. What are their KPI's?
11. Go wide. Sales? Database? Staff? Company size? Expansion?
12. Identify the most important.
13. Go deep.
14. Ask about their budget. Is it allocated? Are there any other decision makers or factor that may affect the budget? It's important you know what you have to work with up front so you don't over promise.
15. Ask what superpower they think you have to bring to the project. Do this with some light hearted humour. EG: "I know this is a silly question, but I'd like to know exactly why you have chosen to speak to me about this project at this point in time, so can you tell me what super power you think I have to bring to this project?" And then get comfortable sitting in the awkwardness.
16. Ask them if they have any questions at this stage of you. Resist the urge to talk about your skill set, plugins, technology or specifics. Just say, I'll take a listen over our meeting and come back with the best solution. If they press you on specifics, try and stay as vague as you can.
17. Sign off by thanking them for their time and letting them know you'll chat with your colleagues and get a proposal back to them in the next few days. Don't commit to 24 hours or 48 hours.