Just-in-Time tip: Preparing for a client meeting

There are three key elements to any client meeting:

1. What you do to prepare for the client meeting (the meeting before the meeting).
2. The actual client meeting.
3. What you do after the client meeting (the follow up).

The meeting before the meeting

Whether you are hosting a meeting alone, or with other colleagues at your firm, the meeting before the meeting is as important as the meeting itself. Use your judgment as to how formal this meeting is, but at the very least, be sure to cover the following:

When you're hosting the meeting on your own

1. Have the big picture in mind. Know where this meeting fits in relation to the overall relationship you'd like to develop with your client.
2. Then have a clear idea of what you want to accomplish specifically at this meeting.
3. Set objectives/desired outcomes.
4. Plan the close (how you're going to end the meeting) and then segue to next steps.
5. Do whatever research is necessary for you to conduct this meeting (client research, industry/market research, research related to the issue you are discussing, etc.)
6. When booking the meeting, ensure the client is aware of and aligned with the purpose for the meeting.

When others are involved

1. In advance of the client meeting, schedule an in-house strategy meeting with all the people participating in the client meeting.
2. Make sure everyone has a purpose for attending and that they understand what their specific role is.
3. Assign tasks/accountabilities for each person.
4. Divide and conquer when necessary, but remain the lead person for the purposes of the client meeting.
5. Communicate your intentions and desired outcomes for the meeting.
6. Seek their input and get alignment before meeting with the client.

Having the meeting

Assume you are the host of this meeting, even if it takes place at your client's office. This way you will always have control over the direction it takes. Key elements of hosting include setting the time line, objectives and seeking their agreement at each step. Here's how you can do that:

1. Confirm with your client the time allotted for the meeting.
2. Restate the previously agreed to agenda and outcomes.
3. Always reconfirm the direction and make adjustments as necessary. And always be aligned before you start.
4. Keep on track and stay focused on your desired outcomes. Use/leverage the research you prepared if needed.
5. As the meeting comes to a close, confirm that your client's objectives were met in the meeting.
6. When your meeting involves the exchange of detailed information and note taking, advise your client that you will follow up the meeting with an email that confirms what you heard and outlines next steps. At the very least, establish next steps.

The follow up

The follow up is as important as the meeting itself. This is where you demonstrate to your client that you heard them and that you get them. This instantly helps you build/maintain trust and credibility. And - you will stand apart from your competition in a meaningful way.

1. Do what you said you were going to do. Whatever next steps you agreed to - do them.
2. At the very least, send a thank you note for their time and briefly provide an overview of what you heard and what you believe next steps are.
3. Ask for their agreement on what you heard and the action steps you propose.

Notice a pattern in these tips?

When you have agreement on objectives and outcomes for meetings and actions, two things happen:

1. There's no room for unmet needs to arise.
2. Your client's feel like they are co-creating the path with you and they experience being heard.