



Pre-meeting checklist

Check each box before going to the meeting.

No checklist is better than how you use it. Promise yourself never to be lazy. Success = discipline

- Set goal(s) and purpose for the meeting
 - Minimum goal(s)
 - Maximum realistic goal(s)
- Reflected** on (or know) the participants' goal(s) for the meeting
- Reflected on the participants' *possible* **hidden** goal(s) and purposes for the meeting
- Did we agree on an **agenda** for the meeting
- Sent **meeting confirmation**
- Made a **background check** on the participant(s)
 - LinkedIn
 - Internet search
 - Company website
 - My / our history with the participant(s)
 - Mutual references
- Connected with the participant(s)' on **LinkedIn** and saved the contact information, also in the CRM
- Made **emotional rapport** with the participant(s)
- Made a **background check** on the company
 - Products / services
 - Internet search / company database
 - The company's website
 - My / our history with the company
- Reflected on *potential* **culture bearers/stakeholders** outside of the meeting
- Sent **pre-meeting** questions
- All relevant **material** is ready
 - Brochure(s)
 - Meeting / customer adapted presentation (Only if *absolutely* necessary)
 - Business cards
 - Anything relevant
- Prepared **facilitating/decision leading** questions
- Prepared a very short **presentation** of me, my company and services
- Prepared "**seek no**" questions
- Prepared to common **objections**
 - Argumentation for prices
 - My product/service vs. current solutions/competitors
 - My product's pros and cons
 - Obstacles of change
- Spent 3 minutes just thinking, if I have **forgotten** something



During the meeting-checklist

Openly check each box during the meeting.

Tell the participant(s) about the checklist and explain why it will help to a more efficient and rewarding meeting for all.
Never let your fear of rejection stop you to a mutual rewarding meeting.

- Everyone** have presented themselves, their function and reason for participating
- I have given a very **short** introduction of myself, my company and our services
- We have **socialised** and each participant had time to **speak**
- We agreed on the **duration** of the meeting
- Recap on the agreed **agenda** and the goal(s) and purpose(s) of the meeting
- We clarified what the **result** of the meeting should be
- Gone through** the pre-meeting questions
 - What should the result of a process be?
 - When do you know, you have chosen the right solution?
 - What have you done before?
 - What is your budget? (time/money/people)
 - If what ever we do together fails, why and what went wrong?
- The participant(s) has answered **“the five questions”**
 - Why / what is the reason?
 - What do you have / do now?
 - What works well?
 - What could be better?
 - If you were to change, what would you change?
- Asked about **“culture bearers & stakeholders”**
- Have asked **“seek no”** questions
 - Why should you?
 - What would the disadvantage be?
 - How are the disadvantages smaller than the advantages?
 - Why should you choose us / our product?
- Asked **order closing** questions (if relevant)
- Summed up** the main points of the meeting
- Agreed on **next** action(s)
- Agreed on **next** contact
 - Date: _____
 - Time: _____
 - Who: _____
 - What: _____
- Asked the *“is there anything, we forgot to ask each other?”*-question
- Asked for **“leads”** (if relevant)



Post-meeting checklist

Check each box immediately after the meeting.

No checklist is better than how you use it. Promise yourself never to be lazy. Success = discipline

- I have written down the **result** of the meeting and my comments in the **CRM** system
- I have written date and time for follow-up in the **calendar** and **CRM**
- Connected on LinkedIn and saved *un-known* participants' contact information, also in the CRM
- Identified** specific or *possible* culture bearers / stakeholders
- Reflected on which **mistakes** I made during the meeting (minimum one, maximum three)
- Reflected on what I did very **well** during the meeting (minimum one, maximum three)
- Evaluated** on the pre-meeting *minimum* and *maximum* goal(s) versus the meeting's *actual* goal(s)
- Evaluated on the **participant(s)**' open and *potentially* hidden goals
- Evaluated on the **effort** compared to the **realistically possible** result of the effort - what is the **potential**?!
- Re-evaluated **minimum** and **maximum** realistic goals
- Prepared the content and method of **follow-up**
- Followed-up** on "leads" I got during the meeting and let the lead-giver know the outcome
- Reflected on what I can learn from this meeting
- Reflected on what I can do **differently** in future meetings
- Reflected on what I will **continue** to do in my meetings