Meeting Agenda

Review this meeting agenda verbally when you book the appointment. Ask the prospect to provide their input, then email it to them. Bring copies if you are meeting in person. Review this agenda as you start the meeting in person or online.

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1. **Purpose**: Determine if there is a fit between your company and ours.
2. **Two Ground Rules:**
   - We need to be totally honest and open with each other.
   - It is OK for either of us to end the conversation at any time if we determine that there is no fit.
3. **Your Issues:**
   - Where are you NOW?
   - Where do you WANT to be? Why?
   - Where do you NEED to be? Why?
   - **NOTE: THEY MUST QUANTIFY THEIR PAIN!**
     - "In round numbers, how is this impacting (the company/your division/you)? $10k? $100k? A million dollars?"
     - Until they admit the cost of their issue, your proposal is just wishful thinking, a shot in the dark, which is why they fight you on whatever you typically quote.

Sales trends	Recruiting	Turnover	Productivity	SEO/SEM/PPC	Prospecting
CRM	Training	Copywriting	Sales Meetings	Blogging	Negotiation
Sales Enablement	Sales Management	Culture/ Morale	Integration Tools	Sales Force Automation	Selling on Value
Reporting	Social Media	Goal Setting	Accountability	Billing	Follow-Up
Marketing Automation	Video Marketing	Marketing Campaigns	Email Marketing	eCommerce/ Shopping Cart	Proposals/ Quoting

4. **Budget:**
   - What can you invest?
   - When can you invest?

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5. **Decision-Making**
   - Your top 3 non-negotiable criteria when selecting a new vendor/partner.
   - How do you make decisions at your company?
   - Who is involved? (Committee, Partner, Spouse, Advisor, Executive Staff)
   - Where? When?
6. **Proposed Solutions:**
   - How we work
     - I.P.A.—Initial Process Assessment
     - P.S.A.—Professional Services Agreement
   - Support/engagement Options
     - Done For You
     - Done With You
     - Private Coaching
     - Group Coaching
7. **Next Step:**
   - Clearly identify and agree on the next step or…
   - Decide that there is no fit.

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