Pre-meeting Planner



What do I want to achieve from the meeting, where are we today, what's the plan?...

Goal(s) Objective of the meeting	
Reality (of today) What do we know	
Opportunities What might be possible	
Way forward Developing the plan	

Developing an effective meeting blueprint

Pre-meeting (Preparation)

During Meeting (Flow & Focus)

Post-Meeting

- 1. Plan using the Grow model: Why do I want the meeting? Who needs to be involved? Does the customer understand why we are meeting?
- 2. Send agenda in advance
- 3. Check for 'breaking news'
- 4. Ensure colleagues are fully informed as to purpose & opportunity
- 1. Sales Mantra #1: Think business fit, business value, developing long-term relationships
- 2. Sales Mantra #3: Be interested to be interesting
- 3. What's our purpose?
- 4. What do we need to know?
- 5. Think 'Magic35'
- 6. How can we help?
- 7. What happens next?

- 1. Confirm actions (in a timely manner)
- 2. Updated internal systems & colleagues
- 3. 'Thoughtful Response' required?
- 4. Plan next steps (back to GROW)
- 5. Sales Mantra #4: Professional Persistence



