PERFECT SALES MEETING CHECKLIST

The purpose of this Tool is to keep you on track during the preparation, execution, and follow-through phases of a sales meeting. The benefit will be a plan and process for running high-impact meetings that differentiate you as a seller, delight your customer, and achieve the hoped-for outcomes.

Throughout the phases of preparation, execution, and follow-through of any meeting you have, the hoped-for effect and outcomes should be 1) defined; and 2) act as guides for your meeting. You can codify this by using through a **KNOW, FEEL, DO** framework:

- What do I want the audience of this meeting to **KNOW**:

- What do I want the audience of this meeting to **FEEL**:

- What do I want the audience of this meeting to **DO**:

See examples below:

Example 1: The meeting is an interview with a hiring manager.

- What do I want the audience of this meeting to **KNOW**:
  I want them to know that I have experience and the mindset to be a value-add member of their sales team.
- What do I want the audience of this meeting to **FEEL**:
  I want them to feel confident in their decision to choose me as the candidate for this position.
- What do I want the audience of this meeting to **DO**:
  Make me a job offer

Example 2: The meeting is a introductory conversation with a potential customer.

- What do I want the audience of this meeting to **KNOW**:
  I want them to know that I have a clear interest in helping them solve their current business needs and make progress.
- What do I want the audience of this meeting to **FEEL**:
  I want them to feel understood and that achieving their needs is possible
- What do I want the audience of this meeting to **DO**:
  Move into the next phase of the buying process.

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With **KNOW, FEEL, DO** established, you can move through the key activities preparation, execution, and follow-through phase with a guiding goal in mind.

HIGH IMPACT MEETING CHECKLIST

PREPARATION PHASE

- [ ] **Bring an insight** (draw on research from Plan to Win, think "Why now" & "What if")
- [ ] **Construct an agenda** (one page, serves the Know, Feel, Do goals above)
- [ ] **Send the agenda to your meeting partner(s)** (at least one day in advance)
- [ ] **Establish three clear points** (take all the research and goals, and distill to 3 clear, impactful points you will share with your meeting partners)
- [ ] **Build supporting materials** (deck, leave-behind, visuals, testimonial sheet, resume)
- [ ] **Print/bring extra copies of agenda/materials**
- [ ] **Check location or links for meeting ahead of time**

EXECUTION PHASE:

- [ ] **Arrive early**
- [ ] **Use connection questions**
- [ ] **Put all distractions away** (for both in-person and virtual meeting)
- [ ] **Kick-off with Purpose, Benefit, Check**
- [ ] **Let customers know you will ask for feedback** ("We strive to make every interaction better than the last…")
- [ ] **Take notes** (and call it out: "I'm just capturing this…")
- [ ] **Endorse your teammates**
- [ ] **Use relevant types of questions or stories to persuade** (i.e. qualifying questions or success stories)
- [ ] **Pivot through each clear point of your meeting**
- [ ] **Use materials as support, not driver of meeting**
- [ ] **Start to end early**
- [ ] **Close using 6 steps**
  - [ ] **Summarize key decisions**
  - [ ] **Check that Purpose/Benefit were fulfilled**
  - [ ] **Ask for feedback**
  - [ ] **Share actions & accountabilities**
  - [ ] **Schedule the next meeting**
  - [ ] **Say "thank you"**
- [ ] **Care for space as you leave** (push in chairs, throw away/recycle items, collect papers)

FOLLOW-THROUGH PHASE:

- [ ] **Hand-write a thank you note**
- [ ] **Write a meeting recap**
- [ ] **Send meeting recap** (send to meeting partners and other stakeholders within one day)
- [ ] **Record new information in your CRM**
- [ ] **Share progress on your accountabilities/next steps**