



FANTASTIC SALES MEETINGS

Running fantastic meetings is a combination of Knowledge **K**, Skill **S** and Discipline **D**.

Use this checklist to ensure that you show up, stand out and break through in every meeting you run.

Remember: it's your show....so run your show!

KNOWLEDGE

DISCIPLINE

SKILL

SHOW UP

PREPARATION

- K** PLAN - Determine prospect's objective for a meeting
- K** SUCCESS - Outline what success looks like for you
- K** AGENDA - Prepare written agenda
- D** 3 CLEAR POINTS - Be able to state the "3 Clear Points" of this meeting
- S** BRAND - Materials are well-packaged, thorough and beautiful (and you have 2 more copies than you need)
- D** CONFIRM - Confirm purpose, time and location via email day before
- D** POSE - Breathe deeply and check your posture to ensure that your body language projects confidence

STAND OUT

EXECUTION

- D** ARRIVE EARLY - Be at least 15 minutes early
- D** NO DISTRACTIONS - Put phone away and out of sight
- S** SMALL TALK - Ask genuine connection questions
- D** OPEN - Open meeting crisply by stating the purpose, benefit, check
- D** LISTEN - Listen actively by clarifying and restating what you think you've heard
- D** NOTES - Take notes on key points and actions needed
- S** QUALIFY - Use qualifying questions to determine if this relationship/effort has potential
- S** IMPACT - Ask 1-3 impact questions that deepen the conversation
- S** OBJECTIONS - Handle objections by asking clarifying questions and not getting defensive
- D** PIVOT - Pivot smoothly between the 2-3 main subjects of the meeting
- D** PROCESS - Check in periodically to ensure progress is being made and control is being maintained
- K** BOLDNESS - State your point of view clearly and be ready to defend it
- D** HUMILITY - Stay curious, open-minded, listen more than talk and say "I don't know"
- S** PRESENCE - Use body language, humor, silence and repetition to be fully present to what is being discussed
- D** CLOSE - Close meeting strongly using six disciplines: summarize 3 clear points; check to determine if meeting was successful; ask for feedback; state action items with accountabilities; schedule next meeting; say thank you
- D** GIVE BACK - If a 60-minute meeting, start closing at :50; if 30-minutes, start closing at :25
- D** MANNERS - Clean up room and leave it better than you found it

BREAK THROUGH

FOLLOW UP

- D** EMAIL - Send Sales Meeting Recap, deliver any outstanding items earlier than you promised, and say thank you
- D** NOTE - Hand-written thank you note expressing gratitude for time and insights
- D** TRACK - Update CRM with notes, updates and next steps
- S** ABOVE & BEYOND - Look for opportunities to go above and beyond with a small, relevant gift