

Win Before
You Begin

PREPPING FOR SUCCESSFUL SALES MEETINGS



INTRODUCTION:

This guide is designed to equip you with the essential insights and preparation strategies for every client meeting. Remember, top professionals never leave success to chance—they prepare meticulously.

SECTION 1: COMPANY & CLIENT INSIGHT

COMPANY NAME:

- Tip: Double-check not just the spelling but the pronunciation of the company name. First impressions count, and a correctly pronounced name can set a positive tone for the meeting.

CONTACT(S) / TITLE(S):

- Strategy: Use mnemonic devices to remember contact names and titles—associating names with a mental image can help recall them during your conversation.

WHAT DOES THE CLIENT/COMPANY DO?:

- Action Point: Review the company's website, especially the 'About Us' and 'Services/Products' pages, to understand their offerings thoroughly.

WHO IS THE CLIENT/COMPANY SELLING TO?:

- Research Task: Identify the client's target demographics by examining their marketing materials, case studies, and customer testimonials.

WHAT NEWS AND INNOVATION IS HAPPENING IN THEIR INDUSTRY?:

- Keeping Informed: Set up Google Alerts for the company and industry. Follow relevant social media accounts, influencers, and hashtags.

WHAT CHALLENGES IS THEIR INDUSTRY FACING?:

- Analysis: Dive into recent industry reports, financial news, and forums where industry challenges are discussed to understand what keeps their executives up at night.

OTHER KEY COMPANY DETAILS:

- Cultural Insight: Gather information on the company's culture, values, and mission to understand their internal decision-making framework.

SECTION 2: PREPARING TO WIN

WHAT IS MY OBJECTIVE IN THIS MEETING?:

- Defining Success: Define clear objectives for the meeting, both primary (e.g., close a sale) and secondary (e.g., gather intel for future opportunities).

WHAT NEED(S) DOES THE CLIENT HAVE? WHAT ARE THEIR GOALS?:

- Client Goals Exploration: Develop a list of questions that uncover not just immediate needs but long-term aspirations. Focus on how your service/product aligns with their broader business objectives.

HOW CAN I HELP MEET THE CLIENT'S NEED(S)?:

- Solution Crafting: Based on the client's needs, tailor your value proposition. It's not about what your product does; it's about what it does for them.

WHAT VALUE DOES MEETING THEIR NEEDS PROVIDE?:

- Impact Articulation: Quantify the benefits of your solution in terms of cost savings, revenue generation, time efficiency, or other relevant metrics.

WHAT OBJECTIONS CAN YOU EXPECT DURING THE MEETING?:

- Objection Handling: Prepare responses to common objections, drawing on case studies, testimonials, or data that validate your product's effectiveness.

WHY WOULD THE CLIENT WANT TO DO BUSINESS WITH YOU?:

- Personal Branding: Communicate your unique selling points and the added value you personally bring to the table.

WHAT ARE THE NEXT STEPS?:

- Action Plan: Before concluding the meeting, agree on clear next steps, including who is responsible for what actions and the associated timelines.

HOW WILL YOU ACHIEVE THE NEXT STEPS?:

- Follow-up Framework: Develop a follow-up strategy, complete with a timeline and methods for maintaining communication and advancing the deal.

CONCLUSION:

Your preparation can make or break the deal. Use this guide as a blueprint for your meeting success and adapt its insights to fit each unique client and scenario.

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