

ONE ON ONE MEETING

PREPARE·PREPARE·PREPARE

BUILDING BETTER **RELATIONSHIPS** FOR BETTER **RESULTS**

NAME: _____ COMPANY: _____

DATE: _____

PRE-MEETING DISCOVERY CHECKLIST

OUTLINE YOUR GOAL AND PURPOSE FOR THE
MEETING

1- SOCIAL MEDIA

- Do a thorough search of their LinkedIn **and look for conversation starters**
- Review their LinkedIn headshot and banner- **if they don't have one, recommend they get one so the profile will have more exposure**
- Search and review their Instagram, Facebook, and Twitter

2- GOOGLE SEARCH

- Search their name and their company on Google- **get the facts, get the info**
- Review their Google Business Profile- **do your research**
- Read Google reviews of the company **and stress the importance of them**

3- WEBSITE SEARCH

- Review the company website- **get facts, learn about their business**

GETTING TO KNOW YOU

BETTER RELATIONSHIPS- BETTER RESULTS

POWER QUESTIONS

WHAT DO YOU THINK? TELL ME MORE

- 1-** Thanks for your time today, would love to hear your personal story.
- 2-** Why do you like being in sales/entrepreneurship/business owner?
- 3-** What are you passionate about in your business/personal life?
- 4-** How important is networking to you - both personally and business?
- 5-** Tell me your best success story from networking.

- 6-** What is your favorite networking book you've read?
- 7-** What is your #1 lead-generating tool and/or activity?
- 8-** What is your differentiator? Why should my clients do business with you?
- 9-** Who do I need to connect you with?
- 10-** Who is your ideal client?



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TELL ME MORE

- 1) What is your favorite movie?
- 2) What is your favorite food?
- 3) What is your favorite vacation spot?
- 4) What is your favorite sport or hobby?
- 5) Tell me a fun fact about yourself.
- 6) What book are you reading right now?
- 7) Best business book you have read this year

FOLLOW UP

- 1) Send an email
- 2) Send a thank you card
- 3) Find a lead or a connection
- 4) Do a virtual connection
- 5) BE a connector

THANK YOU FOR YOUR TIME TODAY. WHAT'S NEXT?
HOW CAN I HELP YOU?

Email rob@purplecowbranding.com for a free website assessment