

ONE ON ONE MEETING 1.0

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**

4- USE THE WORKSHEET

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. Little synopsis from childhood, high school, college, your 1st year in the real world.
- 2.** Why do you like being in sales or entrepreneurship or business owner?
- 3.** What are you passionate about in your business/personal life?
- 4.** How important is networking to you - both personally and business? Are you a good networker?
- 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?
- 11.** What do you want to be remembered for?
- 12.** How many networking events do you attend in a month?
- 13.** What do you think of Chambers? Are you a member of one?
- 14.** How would you improve how we network?
- 15.** What has been your greatest accomplishment in your business?
- 16.** Who has been the most influential person in your life and why?



VoIP - PHONES - INTERNET - IT SUPPORT - IP CAMERAS

LET'S HAVE SOME FUN. 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?

ONE ON ONE MEETING 2.0

BUILDING BETTER **RELATIONSHIPS** FOR BETTER **RESULTS**
TAKING NETWORKING TO THE NEXT LEVEL

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, banner, cover story- **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**

4- WORKSHEET

GETTING TO KNOW YOU

BETTER RELATIONSHIPS- BETTER RESULTS

POWER QUESTIONS

WHAT DO YOU THINK? TELL ME MORE

- 1.** What is your one-liner networking commercial? (20 words or less)
- 2.** What are some questions you ask in your discovery process when you're in front of a 1st time prospect?
- 3.** What is your #1 differentiator about your company?
- 4.** How do you bring value to your customer?
- 5.** What's your follow up process with your client base?

6. Tell me more on how I can be on the lookout for a prospect for you.

7. What are some organizations or associations you support?

8. How do you track your leads?

9. Who are your best networkers - your Power Team?

10. How can I be of the greatest help to your in our relationship?

- 11.** What CRM do you use?
- 12.** Who is your ideal client?
- 13.** What metrics do you keep score of for your networking activity?
- 14.** How often do you post on LinkedIn? Tell me a LinkedIn tactic or tip you use. Does it generate leads for you?
- 15.** LinkedIn at it's best. Exchange names of people you see in each others network you want to be introduced to.

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