



First Meetings - the nuts and bolts when face-to-face

If you're an old hand at attending new business meetings this advice isn't for you. If however you're new to this area or have struggled to convert as much as you'd like face-to-face, then what follows are some simple nuts and bolts tips to help you.

It's your first meeting with a new prospect. You believe in your company and your proposition, you're good at what you do and you are relaxed and confident.

In addition to discussing the business case for your service or product, the most important thing to achieve today, is a working chemistry. Everything else can follow providing this is in place. And by chemistry, I don't mean getting on like a house on fire - though this can't hurt - but rather it is a mutually felt sense you are both 'talking the same language', that you are people and representatives of organisations that can do business together.

To get this, resist the temptation to offer small talk. It's a myth that people buy people. Initially at least, they buy what's being represented by you, and they're short on time, so it is important that your demeanour aligns to its brand values.

Resist also the temptation to launch straight into your pitch (unless the other party insists you do). Instead demonstrate a keen interest in the individuals in front of you and the business behind them via probing, intelligent and open questions (ones that can't be answered by yes or no) both on and around the brief. It is a cliché,

but still helpful, to think of yourself as a doctor wanting to make the best possible diagnosis of a patient. Explain that you will take them through your credentials in a moment but that you are keen to learn a bit more about their challenges to begin with. Your reservoirs of charm, wit and diplomacy should be focused on how you ask these early questions and how you come across in terms of understanding what they then tell you in response.

You should be doing everything you can to get them to do the talking for the first 15 minutes or so. It is important that during this they reconfirm (for both of your sakes) needs, timescales, their personal positions on the subject and budgeting scope.

After this you will want to take them through your credentials, but be very economical and present only the facts you know are germane from what you've just had confirmed or freshly found out. Do not waffle. It's OK if there are a few silences - let them happen. But if you sense you are talking about anything they do not find of interest stop immediately, otherwise you'll indicate you've misunderstood what they want, and worse, that you fail to appreciate how valuable their time is.

Everything you say and do must suggest convenience, relief of burden and a reflexive intuition. Most importantly in your presentation, lead with your insights, your research and knowledge that directly addresses the issues highlighted at the beginning. Remember it is the '*eureka*

moment' that makes a case study or success story compelling.

Once you've discussed how your credentials will solve their problem(s), it's important you gain an unequivocal agreement that they understand how your business will build value, and even better, do so better than any alternative available to them. Around this point you should also now search out the objections. Look for the stumbling blocks that are easier to deal with face-to-face. Search out criticisms or negative impressions they may have of your business and use this opportunity to resolve them.

Do not leave the meeting until you are satisfied you understand the mechanics of how their organisation hands out briefs and whether roster arrangements may be overcome for specialist projects. Lastly, you should make sure you have next steps in place so that there is continuity and that it feels like both sides are now in a logical process, which ought to come to fruition.

If you feel the situation merits it (if the meeting was properly qualified when originally arranged then it should), let them know you'll send them a proposal (outline

or not, depending on the conversation) to set out the business case for them taking you on based on the specifics you've now learned. They will be able to share this with any others involved in the decision.

After the meeting send a 'thank-you email' within 24 hours with any further information that may be useful (viewpoints etc.) Any proposal should arrive within one week of the meeting. Follow-up proposals with a phone call within 2 days to make sure they've got it and to stimulate them to read it. You need to now find excuses to stay engaged with them but not so that they feel pestered. If for example there is some research that supports the case, send it over. Good case studies are valuable now too. A series of smaller communications involving relevant, valuable information is preferable over one comprehensive, slightly daunting email that may sit unopened.

In conclusion, let's not forget, a face-to-face encounter means people will pick up on subtle signals - on your mood. If you've had a horrible journey getting there, or are otherwise under pressure - try not to take that fact into the meeting. Compose yourself. Breathe, relax, and smile.

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