5 tips to make your next client business development meeting a success!

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For most professionals, the very thought of a meeting with a new prospect or an existing customer to talk through how you can help them with their problem(s) can be daunting.

In most cases, you'll actually know how to solve the issue, but what you're not sure of is how to communicate in a convincing way that you know what you are doing!

With this in mind, here are five tips to make sure your next client business development meeting is a successful one!

Research

Ahead of the meeting, get your team to gather as much information as possible about what the prospective customer is doing and wants to be doing. At a minimum, this should include:

A company background profile with a high-level overview of the industry, products and services. It should also include where your prospective customer sits in the overall scheme of things in their sector (aka their market position). A helpful hint here is to also do a 360-day news alert search. This is relatively easy, although some of the articles may be behind paywalls.

Find out who the decision-makers are

Which decision-makers are attending this meeting?

What is their favourite charity?

How many children do they have (if any) [but don’t be creepy!!]?

What is their preferred method of communication (email, Teams, Zoom, text, phone)?

If you don’t know some of the answers to these questions, don’t go to the meeting.

Customer needs: research – or better, know – what the client’s needs and challenges will be and how you can add value to solving those problems.

Define your goals

Before stepping into the meeting, be clear about what you aim to achieve. Are you trying to close a deal, explore partnership opportunities, or understand the client's needs better? Defining your objectives will guide the structure of your conversation.

Develop an agenda

Create a structured agenda that outlines the main topics of discussion. Share this agenda with the attendees in advance so they know what to expect and can prepare accordingly.

Creating a structured agenda helps keep the meeting on track and ensures that all important topics are covered.

A meeting without an agenda is a wasted meeting!

Practice, practice, practice

Practice, practice and then practice again what your key talking points will be. I always advise people to practice this in front of a mirror. That way you can see how you’ll be visually communicating your key points.

This should help refine your delivery and boost your confidence.

Follow-up and say thank you

After the meeting send a thank-you email to everyone summarising the key points discussed, action items that need to be taken and by when, and expressing appreciation for their time. And remember, if there are action items with a timeframe, diarise/itemise these in your workflow and follow up when the due date arrives (or better still, a little before the due date).

This last tip is the one most don't action and is the principal reason why so many business development meetings result in no further action being taken by anyone.

As always, if you like more information or assistance in preparing for your next business development meeting with a new or current client, feel free to get in touch.

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