| ACCOUNT: |  | ACCOUNT TYPE: |  |
| --- | --- | --- | --- |
| MEETING DATE: |  | TIME & DURATION: |  |
| MEETING LOCATION: |  |  |  |
| INTERNAL PARTICIPANTS: |  | EXTERNAL PARTICIPANTS: |  |

| Preparation | |
| --- | --- |
| STEP 0 – RESEARCH | |

| *Record your findings for each of the sources listed below.* | |
| --- | --- |
| Industry Success Story  & Competitive Intel  *Anything specific to their industry?* | * Finding #1 * Finding #2 * Finding #3 |
| Google  *Google company name and keywords, key contacts, their initiatives, news, success stories* | * Finding #1 * Finding #2 * Finding #3 |
| Financial Reports  *Skim 10-K and earnings call transcripts for key words* | * Finding #1 * Finding #2 * Finding #3 |
| Jobs Postings  *Search their career page to see what types of roles they’re hiring, tech they’re using, etc* | * Finding #1 * Finding #2 * Fin ding #3 |
| LinkedIn  *Intel like tech used, headlines, new employees, etc* | * Finding #1 * Finding #2 * Finding #3 |
| Twitter  *Anything personal?* | * Finding #1 * Finding #2 * Finding #3 |

| STEP 1 – DEFINE MEETING OUTCOMES | |
| --- | --- |



| *Introduction to uncover / explore interest - challenges they need to solve* | |
| --- | --- |
| External Attendee Outcomes  *What does the Buyer need? Business Objectives?* | * Outcome #1 * Outcome #2 |
| Internal Attendee Outcomes  *Such as: qualification, learn more about scope, identify pain & associated impact / metrics, gain credibility, identify potential champion* | * Outcome #1 * Outcome #2 |

| STEP 2 – TAILOR OUR MESSAGING | |
| --- | --- |

| *Plan out the key areas where we need to tailor our narrative and key messaging* | |
| --- | --- |
| Conclusions  *What conclusions do our attendees need to come away with to achieve the meeting outcomes?* | * *Example: We need then to view us as a trusted partner who can help him improve effectiveness of lead gen efforts and improve his conversion rates* * Conclusion #1 |
| Customizations  *How will we tailor the presentation in order for them to come to the listed conclusion?* | * *Example: We can help him increase effectiveness of his outreach and improve conversion rates through increased personalized that requires minimal added effort and leverages existing resources.* * Customization #1 |

| STEP 3 – NEEDED INFORMATION | |
| --- | --- |

| *What are the answers you need to achieve the meeting objectives?* | |
| --- | --- |
| Current State Situation  *What it looks like now* |  |
| Problem(s)  *Challenges & obstacles* |  |
| Implication  *Quantify where possible* |  |
| Desired State  *What is the need payoff?* |  |

| STEP 4 – QUESTIONS TO ASK TO GET THE NEEDED INFORMATION | |
| --- | --- |



| *What are the questions we need to ask to get the answers we need?* | |
| --- | --- |
| Current State Situation |  |
| Problem(s) |  |
| Implication |  |
| Desired State |  |

| STEP 5 – EXPECTED OBJECTIONS | |
| --- | --- |

| *What are the questions and objections we need to be prepared for and what is our messaging in response?* | | |
| --- | --- | --- |
| PROSPECT’S QUESTION / OBJECTION |  | YOUR RESPONSE |
|  | ➤ |  |
|  | ➤ |  |
|  | ➤ |  |
|  | ➤ |  |

| STEP 6 – DETERMINE NEXT STEPS | |
| --- | --- |

| *What Next Steps will you suggest at the end of the meeting?* |
| --- |
| NEXT STEPS: |
|  |
|  |
|  |

| STEP 7 – BUILD YOUR AGENDA | |
| --- | --- |



| *How will this meeting run? What will be covered?* | | | |
| --- | --- | --- | --- |
| TOPIC | OBJECTIVE / WHY? / NOTES | PRESENTER | DURATION |
| Hellos and small talk |  |  | 3-5 min |
| Who we are, introduction | Earn the right to execute disco questions |  | 5 min |
| Discovery questions |  |  | 20 min |
| Commit to next steps & demo |  |  | 5 min |
|  |  |  |  |

| Execution | |
| --- | --- |
| STEP 8 – OPENING STATEMENT | |

| *Does it include your Meeting Outcomes, Key Conclusions and Agenda?* | |
| --- | --- |
| HOW WILL YOU OPEN THE MEETING? |  |
|  |  |

| STEP 9 – FOLLOW-UP | |
| --- | --- |

| *What Action Items did everyone agree to based on meeting outcomes and next steps?* | | |
| --- | --- | --- |
| US: | THEM: | PARTNER: |
|  |  |  |
|  |  |  |
|  |  |  |

| STEP 10 – OTHER NOTES | |
| --- | --- |

| *Anything else you want to document before, during, or after the meeting?* | |
| --- | --- |
|  |  |

