Customer Meeting Checklist

Activity	√
Confirm meeting	
Identify all attendees	
Issue agenda (if necessary / requested)	
Research customer / prospect: (via website / literature / colleagues etc.) • latest news? (company announcements –initiatives, changes) • any ongoing service issues? • payment record / creditworthiness?	
Obtain map of directions (if required)	
Prior meeting preparation: • sales aids (literature, samples, sales figures etc.) • objective(s) for meeting • overall approach and tactics • key questions • likely objections (and how to handle them) • prioritise tradeables and fallback position (if entering into negotiation)	
Arriving at the customer: • have you parked appropriately? • check the mirror – (honestly) how do you look? • be polite to the receptionist / secretary!	
During the meeting: • seating –are you positioned appropriately / comfortably? • set the meeting in context • check timescales • ask open questions • focus on listening • use verbal / non-verbal language to build rapport • take appropriate notes • summarise agreed points / actions • get the next meeting in the diary!	
After the meeting: • send short thank you email / letter • summarise everything that has been agreed in writing • DWYPYWD (do what you promise you will do!) • copy relevant colleagues and update customer files • evaluate your performance –where could you improve next time?	