Initial Customer Meeting Prep Guide

This comprehensive resource is designed to help you navigate the crucial stages of preparing for your first meeting with a customer. This guide aims to enhance your understanding of the customer's needs and set the stage for a successful, long-term relationship. Let's get started on the path to making your customer meetings more impactful and productive.

Conduct Thorough Background Research on the Customer

- [ ] Review the customer's account history, including previous meeting notes and key contacts.
- [ ] Understand their business, industry, and competitors
- [ ] Stay informed about any recent news or events related to the customer from public sources (Investor Relations Reports, Earning Calls, Google News, etc.)
- [ ] Analyze their product usage, spending patterns, and relevant metrics.
- [ ] Retrieve the latest data on usage, satisfaction scores, recent business reviews
- [ ] Identify potential concerns by comparing them against set targets.

Meeting Planning

- [ ] Discuss the purpose and desired outcomes with the internal team
- [ ] Develop a loose agenda to guide discussion
- [ ] Identify who will attend the meeting from the client's side and understand their roles and influence within the company.
- [ ] Research the meeting attendees on LinkedIn. Understand their background, length in current position, interests, etc.

Formulate Initial Thoughts and Observations

- [ ] With context from your research and metrics, have some initial observations or thoughts ready, but be open to adapting these based on the conversation.
- [ ] Be prepared to discuss potential areas where you can add value, but keep these broad and open-ended.

Prepare Insightful Questions

- [ ] What are their key goals and challenges?
- [ ] What are their top priorities, and where do they seek your partnership and guidance?
- [ ] What aspects of the product deliver the most value to them?
- [ ] Where do they see significant opportunities for improvement?
- [ ] What are they looking for in a partnership with your organization?

Make follow-ups from Meeting

- [ ] Review and summarize meeting notes.
- [ ] Conduct a debrief session with your team.
- [ ] Send a follow-up email to the client, highlighting key points and next steps.
- [ ] Update your CRM with new information and action items.
- [ ] Schedule reminders for follow-up tasks and future meetings.