

March 12, 2007

## How to Manage Customer Meetings Effectively

---

Great salespeople are masters of the clock, says Jeff Hoffman, president of Basho Strategies, and managing your time in a client meeting is just part of what it takes to make that meeting work. What other guidelines must you follow to manage your client meetings so that everyone gets what they want?

Hoffman suggests that you begin by clearly defining a personal goal for the outcome of the meeting. Don't define a weak goal such as, "I want to establish next steps or action items." Instead he suggests identifying a specific goal – is it an order? A trial for your software? Expansion into new markets? Referrals? And yes, says Hoffman, you can have more than one goal. Just don't overcomplicate it. You will more likely achieve simple goals.

Next, says Hoffman, work backwards. What do you need to do in order to achieve that goal or goals? Are the people you're meeting with the right people? Do you have the influencer and the decision maker attending? What's the timeline?

"Create a list of all the things that have to happen in order for you to achieve your goal," says Hoffman. "This will help you develop the list of questions you need to have answered at this meeting. Order your questions from very general to very specific. For example, start with questions about the company, industry, and market, and then target your next questions around projects that the client is working on, and finally, questions that target your specific offering. Only then are you ready to develop an agenda that you can share with the customer prior to the meeting."

Hoffman says to limit your agenda to three talking points. Develop the first two and ask your customer for a third point. He suggests saying to your client, "In the 30 minutes we have together, I'm confident that we will have time to discuss a third topic; what would you like that to be?"

# SellingPower.com

## Meetings Newsletter

### A How-To Guide for Meetings that Get Results

March 12, 2007

#### ■ **How to Manage Customer Meetings Effectively (cont.)**

---

With the agenda completed, you now need to focus on the meeting itself. Hoffman advises using all types of vehicles at a meeting because you need to appeal to different types of people. "Everyone has different learning styles," he says. "Some people are visual and will respond well to Power Point presentations. Some are auditory and respond well to literature and conversation. And others are kinesthetic or hands-on learners." How do you tell what learning types you have before a meeting? Well, aside from giving them all a test, you can't, so Hoffman suggests mixing up the presentation to include all types of learners.

"Use Power Point, talk to them, and pass the white board marker around the room and allow people to participate," he suggests. "Break down those artificial walls of you being the lecturer. Get everyone involved."

One final note: Give yourself lead time in case the meeting is cut short for some reason. "You always want to get to your goal at the two-thirds mark of the meeting," says Hoffman. "If it's cut short, you'll still reach your goal and if you end the meeting early, that will leave a very good impression on a busy CEO."