Becoming Truly Customer Focused

GUIDE TO MEETINGS

Client meetings are an opportunity to reinforce your value and build deeper relationships. Use this checklist to ensure you make the most of each meeting.

BE PREPARED

- ☐ Create an agenda & share it with the client
- ☐ Start the meeting with roll-call and a stated goal
- ☐ Finish the meeting by recapping action items & accountabilities
- ☐ Afterwards, email a meeting recap

BE LEARNING

Ask deeper questions about the client's business:

- ☐ Has anything changed with business goals?
- ☐ What developments are you tracking in your market?
- ☐ What more can you tell me about your products/clients/recent wins?

BE TEACHING

- ☐ Share why it matters
- ☐ Provide insight into market trends
- ☐ Speak to examples from other clients

BE FLEXIBLE

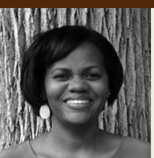
- ☐ Offer tradeoffs for out-of-scope requests or priority changes
- ☐ Share pros and cons
- ☐ Engage the client in making decisions

BE TRANSPARENT

- ☐ Share the 'why'

When raising an issue:

- ☐ Be honest
- ☐ Take responsibility for your part
- ☐ Propose a solution



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SIRENA ROLFE ▪ WWW.TWOOCTOBERS.COM

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