

Using Agendas

An agenda is instrumental in delivering a consistent and professional approach to all client meetings, but sets an especially impressive tone on the initial meeting with a new prospective client.

Create Good Chemistry and then Begin the Meeting

We know you enjoy chatting and catching up with your clients (and they with you too). In fact, that's exactly the type of thing that enables you to build relationships with your clients – which is terrific. But, like everything else, we need to be sensitive of the time. To effectively transition from 'catching up' to getting down to business, simply provide an agenda to each meeting participant. This respectfully signals the beginning of the meeting. Again, establishing rapport is important to set a positive tone before diving into business. Limit this to about 5 minutes and then begin the meeting. You will also have opportunities to ask questions and learn more about your potential client(s) as you progress through the meeting.

Efficient Use of Everyone's Time

Once you start to see the benefits an agenda creates in terms of simplifying both meeting preparation and delivery, you'll be hooked. Not only that, your clients will take immediate notice of your more structured and organized approach in your meetings with them. Who could dismiss a tool that keeps everyone on task and covers off all the key topics? The agenda will also allow you to end the meeting on time. Time is something most people don't have a lot of, so it is important we respect the time they do give us. This means it's critically important to establish a maximum amount of time for each meeting. This also enhances scarcity.



You'll notice in addition to 'name' and 'date' on each agenda, there is a 'time' indicator as well. It's important you clearly spell out the time available to create the proper expectation. If we set a meeting for 1:00 pm and then appear to have all the time in the world, what image are we projecting? Think about the other professionals who serve you: Doctor, Lawyer, Accountant – even your Mechanic or Stylist. How many of these would allow you to show up unexpectedly and have access to significant blocks of their time? It would be a short list.

Using Standardized Agendas

Although there are different types of meetings for different purposes, many of them can be managed by standardized agendas. In this way, we can eliminate the need to create different agendas for every client meeting. This approach will help you effectively manage bringing on new clients, as well as servicing your existing ones. It provides focus, professionalism and consistency – all important in creating a meaningful meeting experience.

Stay tuned for more details on each of the specific Agendas we recommend, beginning with the 1st Appointment Agenda in the new client process, which is covered in this best practice.