

BDU Networking Meeting Checklist

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A guideline for how to conduct one on one meetings with

centers of influence, including questions to ask and key information to uncover, to make sure that you maximize networking opportunities.

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NETWORKING MEETING CHECKLIST		
	Questions	Notes
☐	Review how you met/ connected	
☐	How much time have you put aside for today?	
☐	Other than getting acquainted is there anything specific you wanted to make sure that we discussed today?	
☐	Tell me about yourself	
☐	What did you do before you were at your prior position?	
☐	What do you attribute to your success?	
☐	What are your top 3 goals/ initiatives/ priorities for the upcoming year?	
☐	What are you doing to address those?	
☐	What's working? What's not working?	
☐	Out of your 3 goals, what's the most important?	
☐	Find out their profile for their ideal client	
☐	Ask who they want introductions to/ who are good referrals?	
☐	Uncover their ideal referral sources	
☐	Offer for them to check out your LinkedIn contacts	
☐	Mention one or two people that you will connect them with	
☐	Discuss potential synergies	
☐	Review your background	
☐	Describe your ideal connections	
☐	Ask for specific introductions	
☐	Express gratitude for any referrals or additional business	
☐	Set up next step	

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Date Created

September 2, 2016

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