

BDU NETWORKING MEETING CHECKLIST

AREAS TO COVER	QUESTIONS TO ASK
PRE-CALL PLAN	Review profile, website, CRM and previous notes for key focus areas and takeaways
BUILD BUSINESS RAPPORT	"Fill me in on what has been happening in your world. How are you and your family?" (If this is your first meeting, review how you connected)
CONFIRM TIME/SET AGENDA	"We originally blocked out X time. Does that still work for you? Great! I know what I am hoping to do today but is there anything special you want to make sure that we talk about so that you feel it is time well spent?"
LEARN ABOUT THEM	If it's your first meeting: "Tell me about yourself." (Find out about their family, background, previous positions, what makes them unique) If you already know them: "Fill me in on what's going on with you/your business. How are things going?"
KEY GOALS, PRIORITIES AND INITIATIVES	"What are some of your goals, priorities and initiatives for the upcoming year? What are you doing to address them? What is working/not working?"
CHALLENGES	"What are some key challenges you are facing? How is that affecting your business?"
IDEAL CLIENT/PROSPECT	"How would you describe your ideal prospect?"
Industry focus	"Do you focus or target any industries? If so, which ones?"
Geographic area/footprint	"What area do you cover?"
Company size	"What size companies do you target?"
Title of decision maker	"What are the titles of the decision makers that you target?"
WHO DO THEY WANT TO MEET?	"Who are other good connections for you?" or "Who else would you like to meet?"
MENTION POTENTIAL INTROS YOU WANT TO MAKE FOR THEM	"I know _____ and I'm more than happy to make an introduction on your behalf."
OFFER FOR THEM TO VIEW YOUR LINKEDIN CONNECTIONS	"Feel free to check out my LinkedIn connections and let me know if there is anyone that I know that you would like to know."
ASSOCIATIONS/GROUPS	"What associations are you involved with? Are you involved with any groups that you think might be good for me to check out?"
SHARE YOUR STORY	Your family, where you grew up, how you got where you are, key accomplishments or differentiators. Be purposeful in telling your story so that you are memorable.
DESCRIBE YOUR IDEAL CLIENT	"I love to meet... Do you know of anyone it might make sense for me to talk to?"
ARTICULATE OTHER GOOD INTRODUCTIONS FOR YOU	"I would love to meet..."
ASK FOR INTRODUCTIONS TO PEOPLE YOU KNOW THEY KNOW	"I saw you were connected to _____ on LinkedIn. Would you by any chance feel comfortable making a warm introduction for me?"
COMMUNICATION	"What's the best way to get in touch with you? How often should we talk/meet?"
DISCUSS POSSIBLE SYNERGIES	"I was thinking that we might be able to _____. What are your thoughts?"
DEFINED NEXT STEP	"Why don't we..."
EXPRESS APPRECIATION FOR THE CONVERSATION	"Thanks so much for taking the time today. I think we got a lot accomplished and I am looking forward to (defined next step)."