QALFM
queensland association of law firm marketers

MEETING PLANNER

Client name & date of meeting	
Key client values	
Meeting objectives	
Issues to probe	1.
	2.
	3.
	4.
	5.
Key proposals & evidence	1.
	2.
	3.
Next step	

How to use the meeting planner

Key client values:

What are the client's key drivers – are they focussed on value, cost, reducing exposure to risk, minimising the threat of litigation, reducing claim length, reducing payouts etc.

What is their business behaviour style – driver, analytical, expressive or amiable? This will influence the style of the meeting or presentation, and the type of evidence presented.

Meeting objectives:

What do you want to get out of this meeting? Is it to find out information, to secure a second meeting, to secure a meeting with a decision maker, ask permission to present or submit a capability statement etc.

Issues to probe:

What information do you want? If it is a first meeting, typical probing questions include:

- What are your/your businesses three main issues?
- Which of these is your biggest concern?
- Why?
- Who are your legal providers?
- What do they do well?
- What could they do better?

Key proposals and evidence:

What are you proposing to do for them (if appropriate at this stage)?

What evidence do you have that you have experience in handling their legal requirements?

Different business behaviour styles respond to different types of evidence so be prepared with case studies and specifics of results with facts and numbers.

Next step:

Ensure you know what next step you want to achieve, whether it is another meeting or a presentation, and agree on a date for you to follow up. Don't leave the ball in their court and walk away wondering when you are going to hear from them!