Marketing and Business Development Checklist - Meeting with a Potential Client

One Week Before the Meeting

Assistant:

- [ ] Date/time of appointment confirmed?
- [ ] Individual and company names confirmed?
- [ ] Contact information sent to Marketing to add to mailing list?
- [ ] Checked the latest company news and sent it to Marketing?

Marketing:

- [ ] Common interests/hobbies identified?
- [ ] Basic background of individual and company complete?
- [ ] Social media and company website checked for potential topics of interest?
- [ ] Competitors checked and firm’s advantages outlined?
- [ ] Current firm relationships checked/mapped?

Lawyer:

- [ ] Have you read all research materials?
- [ ] Have you written down in one sentence your goal for the meeting?
- [ ] Do you have a your "elevator speech" ready specifically for this client?
- [ ] Checked in with any firm contacts about current relationship?

Day Of Meeting

Lawyer:

- [ ] Have you identified at least three issues/areas that the company/client need help with?
- [ ] If services are outside of your area, have you spoken with a colleague about the firm's practice?
- [ ] Have you let Marketing know about next steps and/or materials needed?

Marketing:

- [ ] Have you checked to make sure that all previous research/materials have been received and read?
- [ ] Have you confirmed that lawyer has everything that is needed for the meeting?

Day After Meeting

Lawyer:

Does it make sense to pursue as a client? **(steps below should not be pursued before answering this question)**

- [ ] Have you identified at least one follow up question that you can address?
- [ ] Have you asked Marketing to help identify other follow up?
- [ ] Have you put a reminder in your calendar for follow up immediately after and two weeks after the meeting?
- [ ] Have you let Marketing know about next steps and/or materials needed?

Marketing:

- [ ] Added contact to mailing list?
- [ ] Identified key topics individual company is interested in?
- [ ] Set up automatic news alerts for company?