

ACCOUNT NAME:

LOCATION:

DATE:

OTHER INFO:

✓	SUCCESSFUL MEETING CHECKLIST
	What are the objectives and purpose for the meeting?
	Does your agenda support attainment of meeting goals?
	Have you forwarded the agenda in advance to all participants? (or included the agenda in the meeting invite?)
	Have you checked the account team resources list to make sure the right people have been included?
	Are meeting logistics clear to all participants? (i.e. day, time, location, attire, technology, meeting format)
	Have you thought through what preparation is required prior to the meeting? Has pre-work such as reviewing strategy materials or CRM notes been completed?

	Have you checked for recent news or updates relevant to the customer prior to the meeting?
	Do you know how will you differentiate yourself and your company through this meeting?
	Do you have information (facts, statistics, insights) prepared to disrupt their thinking about the status quo and thereby help motivate them to want to move forward to solve their problems?
	Do you know where the company is in their 'buying' cycle?
	Do you have thoughtful questions prepared to help move the customer along in the sales cycle?
	Have you anticipated the issues or objections that may come up during the meeting? Do you have 'Plan B' developed to address?
	Have you anticipated the next steps that you would like to occur after the meeting?

	Will you end the meeting by asking attendees if the session was valuable? (i.e. pros and cons or pros and changes for next time.)
	Are you prepared to follow up with the meeting attendees within 48-hours to keep momentum high?
	Do you have a 'parking lot' for side issues or tangents?
	Do you have clear assignments for roles to make the meeting run smoothly? (i.e. time keeper, note taker/ action items, facilitator)
	Do you have a reliable system for note taking and capturing key information and action items?
	Have you thought about ideas to make the meeting engaging, fun or motivating?
	Do you have a list of people to thank for their role in making the meeting successful? (I.e. meeting arrangers, referrers)