MEETING WITH A CLIENT - how it should be done

1. Prepare

When you have a meeting set up with a client, it is because they need your expertise in solving a problem, creating a solution, understanding project variances, or representing them in litigation; all for which you need to prepare. Manage your preparation in correlation with the issue at hand. Know every issue, every detail of the solution being presented by you (and if necessary alternative solutions), a complete understanding of the variances (why they happened and what the solutions are) etc. … before you attend the meeting.

2. Do Due Diligence

The due diligence step goes hand-in-hand with your meeting preparation. In this regard, there are two types of due diligence you must conduct.

First, study the client. Specifically, find out who the client is. Depending on the case or issue at hand, you might want to know about their personality, what are their REAL issues, who is on their team.

Secondly, conduct research regarding the main issues and questions the client has. Normally, before meeting face-to-face with them you've had some type of communication with the client, either by email or telephone. In this first communication, take notes and highlight the key points of the conversation. Analyse each point critically with your professional hat on and put yourself in the client's shoes; come up with questions they might have overlooked and be prepared to talk generally about the issues they are facing.

3. The First Impression: Look and Act Professionally

First impressions count. You only have about seven seconds to make a good or bad first impression. In those first seven seconds, the other person determines if you are "competent, confident, and trustworthy"

Maintaining a professional appearance and demeanour sends a signal that you can perform your job effectively. Also, besides looking professionally, act professionally and engaging. Shake the client's hand, make eye contact, and listen to them actively. This allows the client to assess your openness and trustworthiness. Keep it simple. Use colloquial terms – you don't need to impress your client with your technical vocabulary.

Maintain and exhibit a calm demeanour, do not react to ego or temper, use open-ended questions politely, feel secure in your knowledge and wisdom and show respect.

4. Choose a suitable meeting place

Be proactive. Initiate the meeting. Then people come to the meeting wanting to hear what you have to tell then rather than to vent their own complaints.

Always try to get the meeting at your office because it puts you in an authoritative position, particularly if there are other consultants involved. At times it can be better to go to the clients preferred venue. Remember the client is paying for your time to get to meeting venues so the less travel you have to do the lower the cost for them.

The person who hosts the meeting tends to lead the discussion. Offer your meeting room for the client to meet privately before or after your meeting. Not having that opportunity is often the reason for clients wanting to meet at their place.

Be hospitable, offer a range of drinks, not just tea and coffee, offer a range of things to eat.

You don't want that and the client will get the impression he or she is not your top priority. The client will feel that their business is in good hands and that they have your undivided attention. This not only shows your professionalism but your courtesy towards the client.

Make sure you leave your cell phone behind or at least put it on silent (not on vibrate) mode. You don't want to be caught glancing at your texts, emails, or having your client ask if you need to take that call.

5. Start on Time

Always start your meeting on time. Again, this goes hand in hand with showing your preparedness and professionalism. It's not only your time being invested here, the client also set apart a specific time in their busy agenda to meet with you.

However, we all know that emergencies happen. It is very important that you are punctual with your clients and your work, for the reason that when emergencies do happen, people will tend to "forgive" your need to postpone a meeting or a deadline.

Use ten to fifteen minutes before the meeting to go over your notes and research. And before you meet the client make sure you spell out their name correctly and know how to pronounce their name.

6. Have an Agenda of Key Points: Keep the Client on Track

Time is money, and by now you know how much your time costs the client. Every time you breathe on the client's project it costs them money; the client will appreciate the efficiency with which you handle this meeting and all subsequent engagements, communications, and interactions. Therefore, draft a mini-agenda that serves as a road map of the key points the client had previously touched on; write next to them all possible answers, alternatives, and opportunities you have identified.

Keeping yourself on track keeps the client on track. Generally, clients tend to sit down and start telling you the story of their lives or worse, try and dominate and control the meeting. Of course, the more information you get the better, but maintain control of what is important and what is not. You don't need to cut your client's story short, but when you see them drifting away from the main subject you need to get them back on track.

7. Manage a Client's Expectations

Managing the client's expectations is critical. First, you can manage potential outlooks if you prepare and study the possible outcomes of the issues at hand. Keep in mind, however, that you are not bullet-proof and certain things might be completely out of your control; you need to identify those too.

When you prepare for your meeting, review all main subjects to be discussed with the client. Identify those areas where potential risks or troubles might arise. Second, set appropriate boundaries of what your client should expect from your services. Your preparation before the meeting allows you to offer a rough estimate of what it might cost the client to engage your services.

When you manage the client's expectations there is a greater likelihood that when things don't come out completely in his or her favour, the client will not be surprised. This will preserve and strengthen the bond of confidence between you and the client.

Throughout the meeting ask open-ended questions, if you must make a statement - always immediately follow the statement with an open-ended question.

8. Give the Client Action Items and Follow-Up

Through the course of the meeting it is very likely that you'll identify other issues that can be resolved at the meeting and discover others that will take research and time. Make a list (write them down) of these issues and hand it to the client. Give a deadline for when you will respond to these issues. After your meeting, write an email or letter to the client summarising the key subjects touched upon in the meeting. Within a week or so of your letter, follow up with the client regarding any other information you have gathered. It is essential you keep the client up-to-date regarding any progress or issues you find along the way.

9. At the End of the Meeting

Once the meeting is winding down, go over any final subjects and ask the client if they have any questions or doubts. This will assure the client you have their best interest at heart. In addition, thank the client for taking the time to meet you and reassure them you will be in touch if any issues or alternatives come up; encourage two-way communication.

10. Trust Yourself and What You Know

The most important thing you need to remember, not only for meetings with a client, but for any stage and project in your professional career and personal life, is to trust yourself. Confidence is something you need to practice; with practice you will get better.

Other techniques that work include:

- Standing up during a meeting to talk – this will give you an immediate position of authority
- Responding to criticism or negative comments by re-phrasing the comment in the form of a question e.g. "We have no confidence in your ability to complete this project on time" - "What level of confidence are you looking for?"
- Use the white board – draw diagrams/pictures – explain complex detail or activity using simple drawings
- Solicit understanding of your message by asking something like - "What else can I tell you about this issue?"
- Pause and silence – when a meeting gets volatile, when tempers are flared when there is discord – stop! Keep silent and wait for the atmosphere to calm. A fire won't burn without fuel.