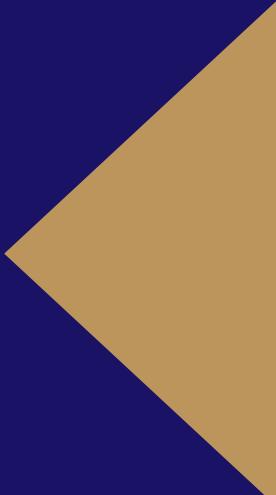


## ELEVARE EDGE: WEEKLY TIP

Pre-meeting  
checklist  
before your  
next client  
meeting



1

# People and relationship mapping

Note prior  
interactions,  
decision makers,  
influencers

2

Client and market research  
Understand your client's business and industry, recent news, competitors

3

# Cultural and etiquette awareness

Understand local etiquette, hierarchy, preferences, customs

4

# Meeting logistics

Arrive early for the meeting, prepare materials, bring business cards

5

# Presentation & materials

Tailor content to your target audience, rehearse, refine

6

Questions &  
active listening

Ask open-ended  
questions to  
invite dialogue,  
uncover deeper  
insights about  
the client's needs

7

# Strategy & engagement

Set meeting objectives, anticipate concerns, next steps

8

## Post-meeting follow up

Decide who will  
follow up, draft  
thank-you/  
recap note

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