ELEVARE EDGE: WEEKLY TIP

Pre-meeting checklist before your next client meeting

1 People and relationship mapping

Note prior interactions, decision makers, influencers

Elevare

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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