



The 12 Step Meeting Approach...

This structured meeting process is one that will allow you to gain your client's confidence and respect and place you in a position as 'trusted adviser'. It will allow you to uncover an enormous amount of 'client needs' and therefore substantially increase fees (5–10 times more) and **add value**.

- Ask about 60 seconds of 'get to know you questions'
- Set the scene
- Make it a 'neutral place' (you are a professional friend, confidant)
- Make sure the client knows the initial meeting is **FREE**
- ALWAYS look for additional services you can 'add value' with, to satisfy your client's needs
- Tell them it will be an '**amazing**' meeting – one of the best they've ever had!!

Then start by asking loads of questions, in a very particular way...!
(Be careful, you may both start to '**LEVITATE**' if you do it right!)

- ☐ 1. Make sure all **decision makers** are in the room.
- ☐ 2. **Set the scene** – why are we having this meeting (the client is wondering)?
- ☐ 3. **Frame** the meeting purpose and it's expected **time** frame.
- ☐ 4. Understand the 'now' by asking a series of **background questions (BQ's)**.
- ☐ 5. Understand what their **motivations (MQ's)** goals & objectives are – what they want to achieve.
- ☐ 6. Ask what some of the **problems (PQ's)** are right now (sticky potholes, speed bumps, brick walls)
- ☐ 7. Ask what the **consequences (CQ's)** are of not doing something different.
- ☐ 8. Ask **how they would know** if they had achieved their objectives.
- ☐ 9. Ask what it would **mean to them (value, VQ's)** if we helped to achieve their objectives.
- ☐ 10. Ask what their **current plans** are to achieve their objectives.
- ☐ 11. Ask **timing** related questions – when they want to get started to achieve their objectives and tell them the **next steps** – and get your service agreement and engagement letter signed on the spot.
- ☐ 12. Book the next steps – another meeting to get started (fact find meeting to identify opportunities and explore situation) **BAMFAM**.

Finally,

close the meeting – and book the next steps. Notice we are NOT talking about our firm, our people, how good we are or our solutions. The entire conversation is about the client, their situation, what they will achieve by engaging us to help them.

HOT tips

- Do not go in armed with a long list of questions to ask – you'll get confused. Just remember the **process** and let it flow
- It's a **conversation** – not an interrogation. Use question softeners before each question
- "so tell me Fred; just so I have it clear in my mind...,"
- So I can understand what's been happening previously;
- so I can get a better understanding of...
- so if I'm understanding you correctly so far;
- would it be fair to say that....,"
- Your **tonality** will play a big part in your success. If you have a weak tone or mumble, you will not gain as many clients.
- Your **enthusiasm** is important. Tell the client they are in a good situation or have a good business and make sure you **SMILE** ('stroke their ego constantly....')
- Spend most of your time on the **BQ's** and **M&PQ's**
- ALWAYS book the next steps **B.A.M.F.A.M**
- Remember to be confident, proud and have **FUN** (they can only say no....!)