

The Ultimate Pre-Meeting Checklist



In the fast-paced world of sales, preparation is the cornerstone of success. Use this checklist to sharpen your focus before every customer interaction. If you're an SDR or Account Executive, it'll ensure that you enter each meeting equipped with what you need to make a lasting impression. For an Enablement Manager, it will ensure that your teams are always adequately prepared for meetings and receive the support they need.

Why is preparation important? It's simple: the more you know about your client and your product, the more effectively you can communicate value. Preparation breeds confidence, and confidence translates into credibility in the eyes of your customers. By following the points below, you'll not only anticipate your client's needs but also address them proactively, setting the stage for a productive and engaging dialogue.

It's not just about checking boxes; it's about building a foundation for meaningful connections and successful outcomes. Here's how:

1

Understand your customer:

Research and gather detailed client data from their website, social presence, and third-party sources to personalize your pitch. This should include information on the stakeholders you're speaking to and the wider business.

Identify key behaviors that impact the bottom line and tailor your content to engage clients effectively. To identify these, look at current market trends, recent reports or general observations on the company.

Examine any past communications to identify what the client might value in this initial conversation.

2

Leverage technology to save time:

Personalize your pitch deck by answering a few questions about your client in Seismic. This will help to create impactful, personalized, and brand-aligned client pitches effortlessly.

Build up your confidence with just-in-time training and coaching in **Seismic Learning** and put your nerves ahead of the meeting to ease.

Create a content playlist with **Seismic for Meetings** before the call to help you present smoothly.

Build confidence with just-in-time training and coaching to ease your nerves before the meeting.

81% say quick access to information and content aids in meeting preparation.

3

Align with your team:

Coordinate with other stakeholders on your sales team to align on call objectives and responsibilities, defining what you want to achieve from the meeting. Whether it's to introduce a new product, negotiate a deal, or simply to build rapport, having clear goals will guide the conversation and measure success.

Conduct a dry run to ensure everyone is on the same page, using it as an opportunity to identify areas for improvement and peer coaching, so you can go back to it later and take lessons on it.

8 in 10 client-facing professionals believe that access to coaching and training content is crucial for presentation preparation.¹

4

Prepare questions and anticipate potential objections:

Develop a list of open-ended questions that encourage dialogue and uncover the client's needs and challenges.

Predict and prepare for any objections or concerns the client may have. This shows you're proactive and committed to finding solutions.

5

Follow-Up Plan:

Put a follow-up plan in place. This will make your storytelling more coherent and help personalize the customer experience.

TOP TIP

Seismic for Meetings can capture action items and suggest relevant content for faster follow ups.

[Find out more here](#) →

By following the steps in this checklist, you're now ready to impress your clients and prospects and build trust even faster.

Interested in how Seismic can improve meeting prep for your team?

[Get a Demo today](#) →

