**How to Set up Meetings That Lead to Presentations**

**Now that you’ve put together your presentation,** you want to start looking for opportunities to present it. This document shares many ideas how you can do that successfully.

**The process goes something like this for most situations.**

**1.** Identify person to present to.

**2.** Send them an email asking for a short conversation.

**3.** In that conversation, learn what they are up to and share ideas. Depending on the situation, say something like: “I have something to show you if you’d like to get X result.”

**4.** Set up a time (from 30 to 45 minutes) to show them your presentation.

**5.** Then in that meeting, deliver your presentation.

**6.** Ask if they are interested in exploring more and if what you are offering might be a good fit.

**7.** Set up a Strategy Session to explore, learn more about their situation and needs and answer questions about your service or program.

**8.** Agree on terms, pricing, time to start, etc.

**That process, more or less can be offered to owners of companies, buyers, management teams, entrepreneurs, etc.**

Below, I’m going to get into specifics for different categories of people and prospective clients.

**1. Your friends and closest business network.**

**These are the people who can do two things for you:** They can give you feedback on your presentation (let you know what works and doesn’t work) and also send you referrals.

**These might be people you know well in business** that may not be ideal clients for you but whom you have a mutual degree of knowing, liking and trusting.

**They might be a member of your local Chamber of Commerce,** or BNI or other networking or professional group whom you know and have spent some time with.

**If you connect with them, they are likely to be willing to help you.** You are not trying to sell to them, you are getting some experience and practice in giving your presentation to.

**So, this is how you approach them:**

**First, send them an email that goes something like this:**

I’ve been spending some time putting together a concise presentation about my business – the results I produce and how I work.

I’m running this presentation by a few of those in my close network. And I thought of you!

Would you be willing to set up a short meeting where I can show you the presentation and get your take on it? Any feedback would be greatly appreciated!

Please let me know and we’ll set up a time.

**If you know, like and trust each other,** you are likely to get a very good response to this. So, set up a time and schedule a Zoom meeting. Then give your presentation.

**At the end ask a few questions:**

**Q1. “What do you think?** Please be honest. Do you think this communicated about my business effectively? And if not, do you have any suggestions for improvement?”

**Note:** look for reactions, not opinions. Them saying you should make your font larger or smaller or use more graphics doesn’t help much. What you want to know is if you communicated effectively about the value or your service – or not.

**Take in their feedback.** Ask questions. But don’t argue with them, especially if they had problems with the presentation. This is a learning experience. It should lead to making your presentation better.

**Q2. “Do you know anyone who might be a candidate for this service or program,** that might be interested in seeing this presentation?”

**In some cases, you’ll get some leads.** In some you won’t. We’ll talk about following up on leads below.

**How many of these meetings should you do?** If it’s primarily for feedback, then just as many as you need to feel you’ve nailed your presentation and are getting positive feedback. This will give you confidence to get in front of actual, prospective clients.

**If you are presenting to those in your network** (such as BNI members or professional organizations) who could refer prospective clients to you, then you might want to go through everyone who is an active networker, connecter and referrer.

**It’s interesting that we belong to networking groups but few people really understand what we do.** How can they refer you confidently if they don’t understand the value of your service or program? They can’t!

**By the way, some of these presentations may generate enough interest** that they’ll want to speak to you about you can help them. It happens. But if you go into these meetings expecting nothing, it will be more fun, and ultimately more productive.

**2. Past Clients**

**In most cases, this is the best immediate source for new clients for your service or program.** They have worked with you before. You’ve helped them and produced results with them. They know, like and trust you.

But you may have offered lower cost or shorter-term programs and services to them, not an HEOB program or service.

And you’ll only know if they are a candidate for your HEOB if you contact them. This approach is a little different than for those in your network.

In this case, you want to catch up with them, share some ideas with them and have a conversation that can lead to giving a presentation.

Again, you’ll send an email and it might go something like this:

I’ve been thinking of your recently! How are things going in your business these days?

It’s been too long. I’d love to catch up with you and share some ideas with you on new approaches to getting X Ultimate Outcome (insert your Ultimate Outcome here).

What’s a good time for you for a short chat?

Cheers, Robert

**In my experience, this kind of email get a very high response.** Usually 50% or better. No kidding. As long as you had a great relationship with the client, they will be happy to hear from you.

**One of the dumbest things we do is not stay in touch with past clients.** We do a project and then we disappear. Why? Well, we don’t know what to say! We have nothing to offer, so it feels like a waste of time. But if we have a new service and presentation, it gives you a great reason to reach out and connect.

**So, you set up a meeting by phone or Zoom.** But what do you say? Here’s what works:

**First of all, ask them what they are doing and what they are up to.** What’s working for them right now? What’s challenging for them right now? And come from service, not need. Can you share any ideas, resources or connections with them? If so, do that.

**But then also ask them…** “Are you looking for new and better ways to get X Ultimate Outcome?”

If they say, “Yes, I am interested in that,” then you can say,

“OK, I’d like to show you something about how you can get X Ultimate Outcome.”

And they may say, “OK, what is it?” And you’ll say…

“Let’s set up a time and I’ll show it to you. I’ve put some slides together.“

If they, in fact, are interested in X Ultimate Outcome, and stated that, they will usually be willing to set up a time for you to show it to them.

**So, that’s what you do.** Set up a Zoom meeting for later. You don’t want to present it right after your conversation. You need to have the time to present it. Don’t rush into it; it will usually backfire.

**So, when the time comes, get on Zoom and give your presentation.** Go through all the slides from beginning to end. Remember, this won’t be the first time; you will have presented it several times already to those in your network.

**After you’ve given the presentation, then say,** “OK, that’s what this is, a program/ service designed to give you X Ultimate Outcome. Is this worth exploring to see if there might be a fit?”

And if it is, you can start the conversation then, but usually set up a time for a more in-depth conversation or “Strategy Session.”

And that Strategy Session can lead to closed business. I’ll talk about the step-by-step Strategy Session in another document.

Note that there are infinite variables in any marketing/selling situation: The client’s situation or need, their personality and decision making style, the timing, the clarity and power of your presentation.

**But if you do this a number of times you will get better and better at it.** And you will have a higher close rate. More clients will say, “Yes,” and you’ll get to offer your service or program.

**I have been doing versions of this for years and years.** And I’ve gotten better and better at it. Giving the presentation makes it much easier because they will really understand the value of your offer and how it works and what it means to them.

**Understand that this process has many steps.** It’s like climbing a set of stairs. And you can only do one step at a time. Once you are solidly on one step, you get to take the next step.

And you will get better and better at this and it will be much easier if you practice it with real-live people.

**3. Referrals**

**A happy client or associate may refer you to a prospective client.** The key to making this work is how you handle the follow up.

If someone suggests a prospective client, you don’t just get their phone number and give them a call. No, you ask the person who referred you about this person.

**What is their situation? What are their challenge?** How interested are they in getting X Ultimate Outcome? And then talk about the best way to approach this person. By phone? By email? Maybe the referral source should contact them first and ask if it’s OK, for you to contact them and let them know what to expect.

The more prepared you are, the more you know about this prospective client the better results you will get.

**So you may end up sending a short email that says something like this:**

John mentioned you to me and said you had talked about the project I had done for him last month.

He said you were having some challenges in this area and were interested in X Ultimate Outcome.

Would you like to have a short phone or Zoom conversation to discuss your situation? I’m attaching a short Executive Summary about the services I offer.

Looking forward to speaking!

**Then you would proceed much like you did with past client.** You’d have a short conversation and learn more about their situation and challenges and see if they were interested in X Ultimate Outcome.

**If they are open, you’d set up a presentation and go from there.** Since you have not worked with this person before, the process might take a little longer, which is OK. Don’t rush the process. Take it slow, step-by-step and make sure they are with you every step of the way.

End

10/14/2020