

TOOL 2.3.1: Checklist for exploratory meeting preparation | Exploratory meeting business information pack

PURPOSE: A checklist to be used by team members engaged in the preparation for the exploratory meeting with the client.

**Business tool for internal use only (not for client use/view)*

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CHECKLIST FOR EXPLORATORY MEETING PREPARATION

PRIOR TO EXPLORATORY MEETING

- Meeting time and date has been agreed with the potential client
- Exploratory meeting confirmation letter has been prepared
- Exploratory meeting client information pack has been prepared including:
 - Exploratory meeting preparation guide
 - What to think about
 - Agenda for exploratory meeting
 - Client focused business introduction
 - Travel guide
 - Team intro sheet
- Exploratory meeting confirmation letter and client information pack has been sent (as per their preference for post or email)
- Personal details of potential client have been entered in system
- Exploratory meeting has been entered in team member calendars
- Meeting room reserved in system
- Exploratory meeting slide presentation pack to be personalised (if appropriate)

DAY OF EXPLORATORY MEETING

- Team members involved to review the exploratory meeting preparation guide
- Welcome card/sign for potential client to be displayed in reception area (if appropriate)
- Team member at reception desk is aware of client arrival
- Meeting room to be organised with required furniture and technology
- Meeting room set up with agenda, notepads, pens and water