BUSINESS MEETING PLAYBOOK

Purpose of the meeting: To clearly outline the pain points of our prospects. Demonstrate how our team and products can benefit them to meet the goals.

01 Research Prospect and Take Preparation

- **Understand our Clients:** Research each participant's background to tailor our team´s approach.
- **Gather Data:** Collect data and reports relevant to the meeting's topic to support our points.
- **Set Clear and Objectives:** Define what we want to achieve in the meeting.

02 Create an Agenda

- **Draft an Agenda:** Create a detailed agenda outlining the topics to be discussed, the order of discussion, and time allocations for each topic.
- **Include Key Points:** Ensure the agenda includes key discussion points, objectives, and any necessary background information
- **Send in Advance:** Share the agenda with all participants at least 24 hours before the meeting to allow them time to prepare.
- **Collect Feedback & Edit:** Ask participants if they have any additional items to add or if they need clarification on the agenda.

03 Use Essential Resources

- **Meeting minutes:** Use pre-designed meeting minute templates to save time while noting key points.
- **Note Tracker:** Assign a team member as a note tracker to note important discussion points.

04 Listen to the queries

- **Identify Pain Points:** Engage participants to understand their challenges and needs.
- **Ask Open-Ended Questions:** Use questions that encourage detailed responses to gather comprehensive information.
- **Listen Actively:** Pay attention to verbal and non-verbal cues to fully understand the participants' perspectives.

05 Introducing the Solution

- **Evaluate Requirements:** Determine the specific needs based on the discovery phase.
- **Prioritize Issues:** Rank the issues in order of importance to address the most critical ones first.
- **Align Solutions:** Match your offerings with the identified needs to demonstrate value.

06 Showcasing live presentation

- **Tailor the Presentation:** Customize your presentation to address the specific needs and pain points identified earlier.
- **Highlight Key Benefits:** Focus on the benefits that are most relevant to the participants.
- **Arrange Live Demonstration:** Conduct a live demonstration of your product or service to illustrate its features and benefits in real time.
- **Engage Participants:** Encourage questions and interactions during the presentation to keep participants engaged and influence clients´ decision-making process.

07 Handle objection

- **Listen to Concerns:** Acknowledge and understand any objections or concerns. Assign a sales leader to handle the part.
- **Provide Solutions:** Offer clear, concise solutions to address their objections.
- **Reaffirm Value:** Reinforce the value of your solution in solving their problem.

08 Close the Meeting

- **Recap Key Points:** Summarize the main points discussed and the agreed-upon next steps.
- **Confirm Action Items:** Clearly outline the action items, responsibilities, and deadlines.
- **Ask for Feedback:** Ask questions like-

- [ ] What would you rate the solution if you had it earlier in your journey?
- [ ] What feature did you like the most about our product?
- [ ] Do you need any other solution to meet your needs?