



1-to-1 Meeting Checklist

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Name of Person You are Meeting and their Firm's Name

Description of their firm, what they sell/service, and their target market: (Be Very Specific)

Their three best customers and why:

1.

2.

3.

Their last three customers and what:

1.

2.

3.

Example of referrals that work well for them:

1.

2.

3.

Valuable resources that would be helpful to them:

1.

2.

3.

New doors they would like to open:

1.

2.

3.

Special Note: After your discussion, review the information noted above with your meeting partner.

Then ask the following questions:

1. Who do I know who....? (relate to each item listed above)
2. Would you be willing to make the initial/first contact for me?