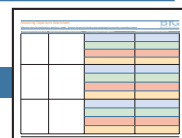


Dynamic Meeting Preparation Worksheet

Prospect Name	Meeting Date	Meeting Location

Goal for the Meeting <i>What do you want to advance? Business development? Relationship? Both?</i>	Framing Statement <i>How would you open the meeting by describing the meeting's goal? Do this in a way that is in everyone's best interest.</i>

Timing		
Estimated length of meeting ↓	Plan for Dynamic Changes in Time	Plan for Dynamic Changes in Attendees



Tough Questions	
5 tough questions they may ask (From the Resolving Objections Matrix)	
1	
2	
3	
4	
5	
Questions we might ask them: (From the Gravitas Model)	



Thinking Styles and Advancing Client Relationships

Name	Path to Raving Fan Level	How to Advance One Step	Thinking Style	How They Buy	Who Owns the Relationship From Our Team?



Agenda, Our Company's Attendees, and Materials to Bring

Agenda	Our Company's Attendees	Materials to Bring	What Not to Bring / What Not to Discuss

Give-to-Get Strategy (Optional Step)

Think backwards to offer the appropriate GTGs and PSEs to advance sales and branch off any existing current work.

Give-To-Get Offer	May lead to this Paid Selling Effort	With this potential \$	May lead to this project	With this potential \$



Deal-Level Positioning (Optional Step)

Use the Positioning Model to develop your Deal-level Positioning and corresponding Proof Points.

Deal-level Positioning Elements

Proof Points



Gift to Bring