

## 1. Background Information

<b>Metrics</b> What financial and other numerical information is important to the client? 	<b>Strategic Goal</b> What is the client looking to accomplish? 
<b>Process</b> What procedural elements are most important to the client? 	<b>Relationships</b> What relationship and political issues are important in this pursuit? 

## 2. Positioning And Key Messages

Use the Positioning Model to develop the key messages we want to reinforce.  
See Module 6 of GrowBIG® Training for more.

Positioning Elements/ Key Messages	Proof Points

## 3. Goals & Framing

What are our goals for the meeting? What is the next incremental step we can advance to?

Framing Statement
How would you open the meeting by describing the meeting's goal? Do this in a way that is in everyone's best interest.
Owner:

## 4. Participant Experience

Use this section to document how you can make the meeting whole-brained® and interactive.  
Document how you can create a "Wow" experience for the participants in each area.

Analytics and Pricing	Wow Factor and Strategic Alignment
Future Process	Team Relationships and Total Client Experience

5. Agenda Design

Use your ideas from the prior step to design a whole-brained® and interactive agenda.

Our lead for the meeting: \_\_\_\_\_

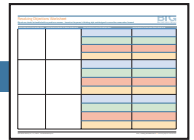
Agenda Topic	How can we make this interactive?	What curiosity can we build that they will want to follow up on later?	Thinking Preferences				Timing	Owner
			Analytical Thinker	Practical Thinker	Relational Thinker	Experimental Thinker		

6. Planning For The Unexpected

Changes in Timing - List out all timing changes that might occur and what you will do if they happen.

Changes in Attendees - List out attendee changes that might occur and what you will do if they happen.

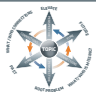
Other Changes - List out other changes that might happen and what you will do if they happen.



## 7. Tough Questions

Tough Questions They May Ask: *For more, see Module 3 of GrowBIG® Training*

Question	Question We Would Ask In Return	Owner	Are we prepared for this?
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			



Great Questions We Might Ask Them: *For more, see Module 9 of GrowBIG® Training*

Question	Owner	Are we prepared for this?
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

## 8. Thinking Styles And Advancing Client Relationships



Client Name	Role (Decision Maker or Influencer)	Path to Raving Fan Level	Thinking Style	What is their Number One Decision Criteria (ROI, Safety, Connection or Strategic Fit/Innovation)?	Who Owns the Relationship From Our Team?

9. Next Steps Before Final Walk Through		
What	Due Date	Who

Other Notes

Date, Time And Location Of Final Walk Through: