

# Keep in Touch | Module #6

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## *The First Meeting: Receiving Permission*

You've set up a couple of appointments, whether on the phone or in person, congrats! So, now you want to know what's next!

### **1. Before**

These are the things you want to do or have prepared prior to the meeting.

#### **1. What to wear**

I only bring this up to avoid rushing around the day of the meeting trying to determine what's clean and goes together (yep, you benefit from my previous mistakes 😊).

Ideally, you'll want at least three outfits for networking and these meetings. Personally, I tend to dress up slightly for networking meetings and then dress maybe a half step down from that for an in-person meeting.

Why? Because when we're one on one I want to be slightly warmer and personal. In addition to learning more about what you do, I want to get to know you personally a bit more. So, I chose to reflect that slightly in my clothing choices.

Determine what this looks like for you. Is there a difference? Is it the same? That's completely up to you.

#### **2. What to share**

What are *three to five things* you want to share, or are prepared to share, about you or your business?

This could be:

- Who your ideal client is.
- What you do for your clients.
- A recent client success story.
- Something new that's happening in your business.
- Something new happening in your life.
- An opportunity or event they might be interested in.

It can be any number of things, just think about what's happening in your life and business and what you want to share.

Also, if you're looking for some information or help with something, share that with them. Maybe they're in a similar situation or one-step ahead in their business or life. People love to share resources and suggestions!

### What are some of your ideas?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### 3. What to ask

What are *three to five things* you want to know about the person you will be meeting with? These questions will be different depending on how well you already know the person or as the relationship develops.

- Tell me more about your business.
- Who is your ideal client?
- Tell me about the people you most love to work with.
- How can I recognize who is a great client for you?
- What do you like most about your business?
- How did you get started?
- What is the biggest challenge you are dealing with right now in your business?
- What ways have you found to be most effective in promoting your business?
- What resources or support are you looking for right now?
- What do you like best about what you do?
- What does your ideal business day look like?
- What are you excited about right now?
- What are you looking forward to?
- Have any trips planned?

- What do you do for fun?
- Do you have kids? How many? What ages?
- **Tell me more** (*it's an easy go-to statement*)

Be prepared to answer some of these questions for yourself too! Generally, when you ask someone something like “how did you get started,” they’ll ask you the same question.

Also, review your notes about previous conversations with the person you’re meeting with. Maybe last time you talked they mentioned a vacation they’ve since taken. Ask them how it was!

**What are some questions you want to ask?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**4. Set your intention for the meeting**

Go through the same steps you went through for setting an intention for making phone calls. Also, you should have a bonus worksheet that walks you through this. Print it out before the meeting and fill it in!

Take the time to fill it out! It is a powerful exercise that allows you to choose who and how you want to be in the meeting. I keep repeating this because it’s an important step that is easily overlooked.

**5. Other things to keep in mind**

- *Arrive at least five minutes early.*  
This gives you some buffer time if traffic is bad. AND more importantly, if you need a couple minutes to get settled, you have them!

However, don't call five minutes early ☺

- *Bring a notebook or something to take notes on.*

This way you'll remember what you talked about and if you told them that you'd send them any information or connect them with someone.

You also want to write down things that you might want to ask them about next time you talk, like how that vacation was.

## 2. During

*These are some things you want to remember to do while you're at the meeting or on the phone.*

- **Smile**

Sometimes we get so caught up in making sure everything we want to cover is covered, we forget to do the simple things like smiling. It's a simple expression that goes a very long way.

- **Be genuinely interested in what they're saying, ask questions**

This goes along with smiling. We can get so caught up in what we want to say next that we don't realize we're not really hearing what's being said.

- **Don't worry about asking all your questions**

You prepared them in case you needed them, they're merely a starting point. Listen to their responses and go off sheet!

- **Ask for permission to keep in touch**

Toward the end, you'll ask them for permission to keep in touch. When they agree you'll want to ask them for their address. And if you plan on sending birthday cards ask for their birthdate (only the month and day, not the year)

Here's an example of how that could look:

You: I'd love to continue to keep in touch with you. I occasionally like to send cards and notes. Can I include you?

I'd love that! :Your friend

You: Great! What's your address?

{address} :Your friend

You: I love sending birthday cards too, when's your birthday? I only need the day and month, not year.

{birthday} :Your friend

You: Thank you! And {name}, just let me know if I can help you in anyway. I love being a resource for people. And if you know





### 3. After

*The meeting is over but a better relationship is just starting!*

- **Update their record in your contact management system**

Update their record with an A, B or C and anything you want to remember later. Usually I add a bit of detail about their business, some details of what we talked about and anything I might want to ask about later (like a vacation).

- **Send them any information you promised them**

Send an email with any information you mentioned or do any introductions as soon as you can. This does two things 1) you get a good reputation for taking care of things and 2) you don't have to keep thinking about sending Suzy that article you promised her.

- **Send a thank you note!**

Regardless of whether they gave permission to be kept in touch with or which letter you assigned them, send them a personal, handwritten note. If you don't have their address, send an email.

I'm going to sound like a broken record here, but modify these steps to work for you. Personalize it, make it reflect who you are!

Also, there is not a right or wrong way to do this. This takes practice. The first time I had a permission conversation with someone I was so relieved that they gave me permission and their address I forgot to do any of the other things in my script (*yes, all the scripts are based off the ones I use*).

After many of the meetings I've had with people I've been in a *really* good mood because it was so much fun to connect or reconnect with people and find out what's going on for them in their life and business.

So, play with it, try new things with it and **have fun**.