

First Meeting Workbook

DO	WHY	NOTES
1. CONNECT	<ul style="list-style-type: none"> • Get to know the client and their business well. • Profile their school, education, work experience, and family. 	<p>Take notes about their company.</p> <p>Focus on looking for areas within their frame of reference to connect and bond on.</p> <p>The business questions should be a 30,000 foot view (very broad).</p> <p>Circle back around in the next stage to clarify pain points.</p>
2. WHAT IS THE BUSINESS?	<ul style="list-style-type: none"> • Identify what the business does and how they provide value. • Learn about the success metrics of the business to create milestones. • Identify points of innovation to transfer thoughts and value from other industries. 	<p>Listen for the needs below the surface, ask more questions to clarify, and take notes. You should be doing little to no talking during this part.</p>
3. ALIGNMENT	<ul style="list-style-type: none"> • Get information to determine overall alignment. • Identify what outcomes are needed from the client. • Identify what must be addressed in the next steps. 	<p>Take the information that you have acquired to create a sandbox for the project to live in; build the world and environment for the project to be executed within.</p>
4. CLARIFY, ASK, & NEXT STEPS	<ul style="list-style-type: none"> • Review what you both have said and covered in the meeting by reciting a short summary of the meeting. • Confirm what they need to see in a proposal. • Identify next steps and tasks to accomplish. 	<p>Take the information you've learned and turn it into a concise explanation of what their needs are and what they want.</p> <p>Outline a timeline for next steps and let the client know what to expect. You've already bracketed a budget: now it's time to get a specific bid.</p>

Who are you speaking with? School, family, life...

What are the basics of the business?

What's the problem that needs a solution? What are their pain points?

Are there any other stakeholders? What are their roles?

How did your last design experience go?	
If time and money were not an object, what would the perfect solution be?	
What's your timeline?	Who are the decision-makers? What factors influence their decisions?
What's your financial commitment/budget?	
What do you need to see in a proposal?	

<p>Clarify to the client what have you discovered?</p>	<p>Next steps:</p> <p>Directly after meeting:</p> <p>At a later date, by _____:</p>
<p>Have we covered everything? Has our conversation sparked anything?</p>	

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- The Perfect Proposal Guide
- Real client example proposal
- Design-ready proposal template