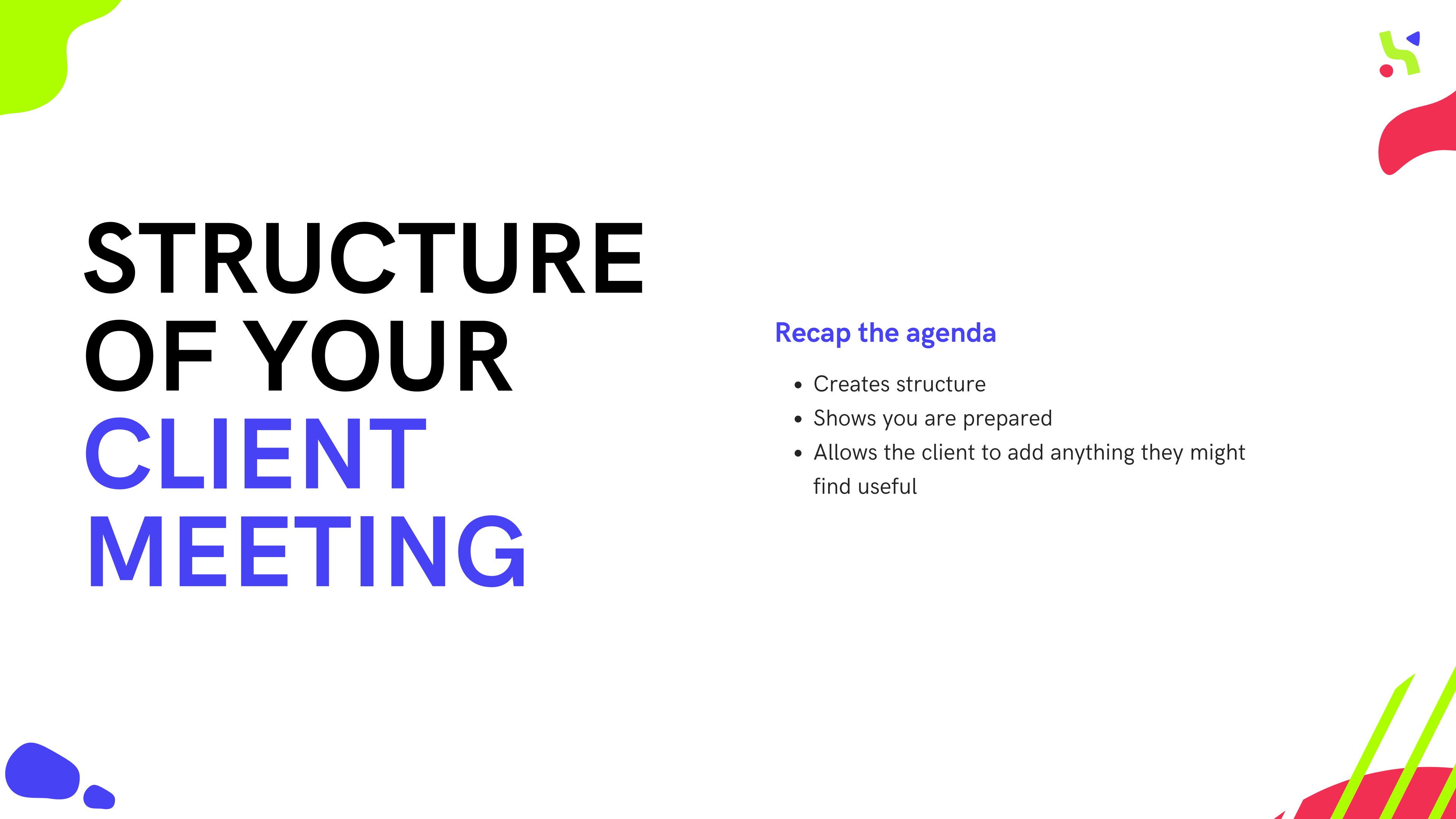


CLIENT MEETING TEMPLATE



BEFORE A CLIENT MEETING, HAVE YOU....

- Set an agenda and send it with your meeting request?
- Done your Research? Including- the company, the person you are meeting, news/industry updates, the client's history with your business, current live roles, other points of contact in the organisation, current clients/roles you can use to demonstrate credibility, what USP's of yours will be of interest
- Planned your Timing/travel? Is there anyone else you could also meet with?
- Dressed appropriately?!



STRUCTURE OF YOUR CLIENT MEETING

Recap the agenda

- Creates structure
- Shows you are prepared
- Allows the client to add anything they might find useful

Q&A Session - The Business

- Mission, purpose and values
- Organisational structure
- History and Achievements
- Growth plans- new products, internal projects etc
- Culture and Benefits- why do people work there
- What their competitors would say about them
- What makes them different- get them to sell to you
- Contacts background/history
- Teams under their management and level of authority



TIP- use the information you already have to demonstrate your knowledge and ask relevant questions to what you already know!

Q&A Session- Recruitment

- What they recruit , how often and the process
- Perm/contract/temp % split over last 12 months
- Year ahead forecast for staffing- spend and budget
- Current agency relationships and how it is managed
- What they like about current suppliers
- Pain points or gaps in current process that an agency could address
- Most challenging roles and why
- What types of candidates they would like to see speculatively
- Additional resources that would be of value
- Where they could see value in a partnership



PITCH

- Build authenticity- why you work in Recruitment and why you chose your agency
- Build credibility- case studies and successes/achievements of clients/roles you have worked on
- Your recruitment process- passive candidates, sourcing process, use USP's to bring this to life- what do you do differently and why should they work with you?



TIP- Tailor to each meeting- only provide information that meets the clients challenges and areas of interest.



CLOSE

- Ask for feedback on the information you provided
- Find the objections and offer solutions/more information
- Ask for a current job or ask for commitment on the next one- if yes, when? If not, why? Handle those objections as best as you can
- Recap what has been covered and ask if they need any other information
- Create an action plan for next steps and get the clients commitment
- Ask for a referral into another business area (if meeting went well)



ACTION PLAN TO INCLUDE:

- Key challenges for the client
- Key role types/verticals for you and the client to work together in the future
- Potential upcoming roles/pipeline discussed
- USP's that are most relevant to the client
- 1 case study/achievement that is most relevant to the client
- How the client likes to be kept in touch with
- How regularly you will keep in touch and in what format
- When you will next be in touch and with what



NEXT STEPS

- Add to BD Plan and create a plan for contact going forward
- Email the action plan to the client with a thank you and any additional information
- Write up detailed notes on your CRM record- try and include something personal you can use for next point of contact



AGENDA EXAMPLE FOR NEW CLIENT MEETING

Hey [Name],

I'm really looking forward to meeting you on [Date and Time] - thanks for making the time. Appreciate how busy it is atm!

To keep things productive and valuable for you, I've jotted below what I'd like to cover off. Of course, feel free to add anything you'd like to discuss too:

9:00 AM - 9:10 AM: Dive into your organisation (History, achievements, culture)

9:10 AM - 9:30 AM: Explore your recruitment processes and any key challenges

9:30 AM - 9:40 AM: Learn about [Your Company] and how we can support you

9:40 AM - 9:45 AM: Share intel on the [your market area], Questions and mapping out next steps

Should you have any questions beforehand, please reach out. Otherwise, look forward to seeing you soon ;)

Ez

