

B2B2C Meeting Outline

1. Tell me about your business?
 - a. What do you do?
 - b. How long have you been in business?
 - c. What was your background prior?
 - d. Who are your customers?
 - e. What do you feel is your biggest differentiator vs. your competition?
2. Who is [insert your company name]/Who am I?
3. State your goals for the relationship:
 - a. Very transparently, to have you refer some or all of your [insert description of services you offer]/customers to me
 - b. To identify how I can best help you grow your business
 - c. To identify and introduce one another to trusted associates/businesses that we could each benefit from (i.e. "do you know any insurance adjusters you could introduce me to?"
4. How can I help you grow your business?
 - a. Is there type of job that is your bread and butter that I can be looking out for?
 - b. Is there someone (a person, employee, business relationship) that you are looking for that I can help try to connect you to?
5. Ask for the Sale:
 - a. How can I receive the opportunity to estimate a job for you or receive a referral from you in the very near future? (problem solve, objection handle...) Do you have a lead/referral I could estimate for you today?
 - b. Set next steps to follow up on this/ask for leads ("do you mind if I call you next Monday to follow up and ask for any leads or referrals you may have for me?")
 - c. My best relationships are with (e.g. restoration companies, realtors, insurance adjusters, remodelers....) Do you have any relationships with any of the above? Would you be willing to do an introduction?
 - i. Again, who could I introduce you to?