

THE DISCOVERY MEETING BLUEPRINT

OVERVIEW

This one-hour workshop equips sales professionals with the tools and techniques to conduct impactful, value-driven client meetings. Participants will learn how to prepare effectively, structure meetings for maximum engagement, and build trust through strategic communication.

The course focuses on steering conversations toward client needs, offering actionable insights, and positioning yourself as a trusted advisor. Sales reps will learn how to close meetings with clear next step and actionable outcomes.

KEY LEARNING OBJECTIVES



Prepare effectively for a meeting

Research your client, the business, and gathering insights before going in.



Set the scene and structure

Stay in control of your meetings by setting a strong agenda at the start.



Scope out the landscape of the business

Utilize questioning structures that will give you a full view of business needs.



Introduce value once you know the challenge

Deliver a value-based pitch tailored to the client and the challenges you uncovered.



Close with clear next steps and actionable outcomes

Leave meetings with a plan so you and your client know what's next.



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CLIENT MEETING PLAYBOOK.

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