

The Ultimate Sales Meeting Checklist



We've all heard the Boy Scout motto, "Be Prepared," so when it comes to sales meetings, why do so many presenters show up unprepared? No matter what kind of sales pitch you are presenting, it's vital to be prepped and ready for action well before the meeting. If not, you may appear to be an unprofessional jackass. The Vx Group Ultimate Sales Meeting Checklist is designed to get you to the meeting on time and make a distraction-free presentation.

Travel

- Confirm meeting location address
- Map out directions and parking information
- Confirm start time and plan to arrive at least 15 minutes early

Technology/Physical Materials

(Day before presentation)

- Decide on who is bringing laptop
- Decide on who is bringing projector or confirm projector/screen are at meeting site
- Run updates on OS and software programs
- Save electronic copies of presentation to:
 - Presentation computer
 - USB drive (Readable on both Mac and PC)
 - Dropbox or other cloud sharing service
- I have Emailed a copy to myself
- Bring in laptop bag:
 - Power cable and extension cord
 - HDMI, VGA and Audio adapters
 - USB drive with copy of presentation
 - Speakers (if needed)
 - Slideshow remote (optional)
 - Phone for dial in (optional, but recommended)
 - Phone or web conferencing information
- Print color copies of presentation for all attendees plus three extra

Attendance

- Provided client with names, bios of my team members attending
- Inquire and receive information on client-side meeting attendees
- Research client-side attendees and create cheat sheet of their interests and experience

Day of presentation

- Arrive at least 15 minutes early
- Set up computer/projector
- Test video, audio and phone/web conferencing
- Hand out physical copies of presentation
- Check zipper (not kidding – you don't want to do all of this work only to have your fly open the whole meeting)

Additional To-dos

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____