### First Meeting Objectives & Questions:

The conversation will not necessarily go in order of the objectives and questions listed below; however this list of bullets and questions are designed to address the different components of information we are seeking to obtain in the First Meeting. If you do not get all of the information you need in the first meeting – which is ok - then part of your follow up plan with this prospect (presuming that you deem them qualified) will be to obtain the additional information.

### Build Rapport:

* Thank them for inviting you in or for giving you the opportunity to learn about their organization.
* Let them know that part of the reason you are there is to make them aware of Mytech, but more importantly to allow us to learn about them and their business.

### Find out what they know about Mytech.

* “What do you know or have you heard anything about Mytech?”
* They will most likely respond that they do not know anything. So we want to respond with a brief value statement of our organization. No longer than 1 – 2 min. This is merely to pique their interest.

Learn about them (more Rapport building)

* Ask them about their history, how long have they been at this company, what did they do before they were here and what do they like about what they do? Etc. Get them telling their story
	+ People love to talk about themselves and this gives you the chance to understand their motivations, experience etc.

### Learn about their Business:

* Ask about what drives their business, how does their business make their money? What markets do they serve local, regional, national, international etc.
* Are they subject to any regulatory/security measures? Such as: PCI, SEC, HIPAA, SOX etc.
* What initiatives do they have in the next year?
* What obstacles are they facing that may delay or prevent them from achieving their goals?
* Have they engaged outside resources before – for anything?
* How do they handle IT services today? Internal staff or external partner – or both?
	+ What circumstances led to how they handle these details today?
	+ What do they like (most) about their current arrangement? What difficulties do they have with the current situation? What would they choose to improve if they could about the current situation?
	+ Please tell me what an ideal arrangement would look like for you?

### Understand the Stakeholders that we should work to involve through the Decision Making Process:

* What are their timelines?
* Have they established a budget for the initiatives they identified?
* Who should be involved in the Strategic, Vision discussions around the initiatives?
	+ Power Users, Vocal Members of the Team, Other Department Heads (critical to the org in particular)
* What is the decision making process – are they the same people?

### Set Expectations & Next Steps:

* What Follow Up is needed?
* Identify Plan A, Plan B vs Plan C
	+ Plan A – The BDS/BDE deems the prospect as qualified AND they are actively engaging Mytech in the sales process.
	+ Plan B – The prospect does not have an immediate opportunity, however they are a good fit for Mytech and as a sales rep you feel they are worth the investment of your time to actively pursue.
	+ Plan C – The prospect does not have an immediate opportunity, however they are a fit for Mytech. As a sales rep, you feel that you do NOT want to invest your time to actively pursue, but you will add them to Mytech’s marketing list and if the prospect engages, you will engage in the sales process.
	+ Plan D – The prospect does not have an immediate opportunity, they are not a fit for Mytech and you do NOT want to pursue. Even if the prospect engages you do not want to engage them in the sales process.
* Identify next time to engage and possibly invite them to our office – if appropriate.