Tips & Guidelines for Successful Face-to-Face Meetings

Strong professional relationships are built on mutual respect, curiosity, and a genuine desire to understand one another's work. These simple best practices can help make your 1:1 meetings more valuable and enjoyable for both parties.

1. Do Your Homework

- **Spend 5–10 minutes** reviewing your meeting partner's website, LinkedIn, or PDX Execs profile before your meeting.
- Jot down a few questions or areas of curiosity so you can ask relevant and engaging questions.
- Consider: *What can I learn about this person's services, specialties, or ideal clients before we sit down?*

2. Aim for a Balanced Exchange

- A good rule of thumb: **aim for a 50/50 conversation**. If one person talks more than 70% of the time, the meeting can feel imbalanced or transactional.
- Invite your meeting partner into the conversation: "I'd love to hear more about your work—what types of clients are a great fit for you?"

3. Ask Thoughtful, Open-Ended Questions

- Go beyond "What do you do?" Try questions like:
  - *What inspired you to get into this line of work?*
  - *What's a recent client win you're proud of?*
  - *Who is your ideal referral?*
  - *What's a misconception people often have about your industry?*

4. Be Present and Curious

- Treat the meeting as a two-way discovery, not a sales pitch.
- Listen actively, take notes if helpful, and allow pauses for reflection or follow-up questions.

5. Share What Makes a Good (and Not-So-Good) Lead

- Be specific: "A good referral for me is someone who's overwhelmed with a recent life transition—like downsizing, a move, or estate cleanout."
- Equally important: clarify what *isn't* a good lead, so others can make high-quality referrals.

6. Use a Meeting Template or Exchange Form (Optional)

- A shared outline or brief intake form if you have one can help guide your conversation and ensure both parties walk away with clear insights and action steps.
- Include space for goals, ideal clients, and specific ways to support each other.

7. Follow Up and Stay Connected

- A brief thank-you email or LinkedIn connection afterward keeps the momentum going. Follow-up is important.
- Reference something you discussed to show you were engaged and listening.

✨ Pro Tip: Great meetings build trust and reputation.

A single well-balanced meeting can lead to long-term partnerships, strong referrals, and unexpected opportunities. Take the time to show up well-prepared and curious—it makes a difference.

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