

New Client First Meeting Flow

Since we're a few days out from our first meeting, let's go over what our work and first session will look like:

1. It's pretty common that clients have new epiphanies, realizations, and ahas once they commit to working with me. Use the first three questions in the Client Check-In form (more on this below) to share those with me — we'll follow up on them in the first meeting.
2. We're able to record our meetings on Zoom. If this is something you'd like to do, I'll give you access and you can record on your end so you can have immediate access to the recording. As soon as you hit record, I'll announce who's on the meeting and the date of the meeting so you'll always know which meeting it was. Clients tend to find the audio recording more useful than the video recording *most of the time*, but use whatever works best for you.
3. As much as we might like to start with a Big Picture strategic review of All The Things, experience has taught me that there's typically a big project on deck or time-sensitive issue (like getting cashflow NOW! or having trouble with a teammate) that's hogging a client's bandwidth from the get-go and, until we get that sorted, they won't be able to think deeply about other things. Thus, my tentative plan is going to be to address those issues in the first meeting or two. Doing so *also* has the benefit of seeing how you'll work things in the field.
 - If you have a strong desire to start with the Big Picture view, make sure to let me know, with the caveat that we likely won't be able to do that and discuss your big project or time-sensitive issue in the first few sessions and you may not get as much simple homework. I love getting into both, but we can't do both well at the same time.
4. I'll be conscious of *pacing* and *depthing* during our first few meetings as we build our working alliance. *Pacing* is figuring out how much biz growth work is enough to get you to dig in without being so much that it buries you. *Depthing* is figuring out how detailed of information I need to provide for you to know how to go forward. Depending on your experience level and resource set, “fix the sales page” or “update your team's roles and responsibilities” may be enough information for homework, but if you're inexperienced with those things, we'll probably need to discuss *how* to do those.
5. Our first meeting is typically about 20 minutes longer than normal, so expect it to last 90 minutes. As we get into a groove, they'll be closer to 60-75 minutes.
6. If I start diagramming or listing something on the whiteboard, I'll take a picture of it and it'll end up in your Google Drive folder within two business days under Boardpics.

7. I *highly* encourage you to schedule some downcycle or reflection time after our meetings. Physical activity — walking, yoga, CrossFit, yardwork — is particularly beneficial; you'll have deeper encoding and integration. Fair warning that you'll likely also be cognitively full after our meetings, too.
8. Filling out the Client Check-In form a day or two in advance of our meeting is the second biggest predictor of success in our work together, with the first being to *really* show up, even if you're not sure what we're going to talk about or feeling like you'd be better off focusing on the work. Doing so allows us both to show up prepared to dig into the work, rather than spending the first 20-25 minutes figuring out what we need to do and getting the information we need to talk about those items.

First Meeting Flow

Here's what you can expect our first meeting to look like:

1. We'll spend a few minutes syncing and settling into the conversation. This will take about 5 minutes.
2. We'll start with the results of your StrengthFinder 2.0 assessment. Clients consistently report that it provides a useful way to understand their strengths and how we'll work together. This will take about 10 minutes.
3. We'll then discuss reflections on your completed Guided Business Review. This serves as a strategic audit and catches us both up on what's been going on in your business and how we might focus our efforts from the get-go. This will take about 15 minutes.
4. We'll then dive into agenda items that get you the traction you need right now. Filling out the Client Check-In form is one source of those agenda items, as well as items from #2 above. We'll spend about 30-40 minutes here.
 - Before you fill out the Client Check-In form, though, read the section above for more context that may help you answer some of the first questions.
5. We'll wrap up the call with a summary, outlining action items, and commitments. This will take 5-10 minutes.

Meetings after the first will have a similar structure. Instead of #2 and #3 above, we'll spend 10-15 minutes going over the key points of your Client Check-In form, and then dive into #4.

Okay! Your next step is to fill out the [Client Check-In form](#). Let's do this!