

Business Development Mindset Checklist

When you're building new skills - including business development - it's normal to be nervous! We've created a checklist to help you prepare and put you in tip top mental condition so you can approach new prospects with confidence.

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Use these 15 questions as a pre-flight checklist before you approach a new potential client to ensure you're in the right mindset for success.

Pre-Meeting:

1. Have I researched the prospect by looking them up online, reading their blogs and some of their social media content?
2. Have I used my research to think through a not-well-known aspect of their interests or personality?
3. Have I prepared an interesting or relevant thing to share when they ask me how I'm doing or what I'm up to?
4. Have I reminded myself of my past triumphs and successes to beef up my confidence?

Meeting:

5. Have I adopted an attitude of curiosity and "how can I serve?"
6. Have I focused on listening and asking probing questions?
7. Have I mirrored back what they say to ensure understanding and help them feel understood?

Post-Meeting:

8. Have I written down key notes and observations to ensure I don't forget?
9. Did I make sure I have a concrete action for follow up - for instance, either sending an article that might interest them or a proposal related to the engagement?
10. Did I follow up in a timely way?
11. If the prospect doesn't respond or is hard to reach, did I follow up in a consistent and respectful manner?

Debrief:

12. Did I write down what I learned from the preparation and interaction?
13. Did I write down what I'm proud of - what I did well?
14. Did I think about what I would do differently?
15. Did I think about what I will fold into future interactions like this?

Meetings with potential clients are key moments in which a lot is at stake: the client might decide to sign on with you as a coach, or go with someone else. By following this checklist, you're far more likely to connect effectively and ensure you're able to make a positive connection and grow your practice.

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