



First Client Meeting

Before the Meeting



Research the client and consider what questions you need to ask.

Examples:

- What is their mission statement?
- What messages are portrayed through their current branding?
- What defines their current branding?
- What are their current deliverables?
- Do they utilize social media, if so what platforms?
- Do they have a current website?

Consider this first meeting a **discovery meeting** where you work to discover your role.

During the Meeting



Consider **sharing your previous** work like a brand study, a case study, past client work, video work, or any other design work that is relevant to the new project.

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This will help the client feel like they have something to be excited about.

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If you do not have relevant prior work to share, consider sharing inspiration that is related to the current project content or topic.



During the Meeting

Place focus on the client's priorities by getting to know their own goals.

Ask some questions:

- What are their wants or needs?
- What are their priorities?
- Do they have a budget for the materials they would like created?
- What do they currently spend on marketing and print materials per year?



After the Meeting



**After the meeting,
follow up with an email.**

Dear client,

Thank you for meeting with me! It was nice to finally discuss your business.. etc.

Here are the action items I plan to work on over the next week:

- Item 1
- Item 2
- Item 3

Is there anything I missed? Do you have any post-meeting questions?

(Insert any **addition questions** you might have here as well.)

(Include the phases and deadlines in an **estimate** with a **contract** including a signature line.)

Our next meeting to review materials (in person or online) is ____ .

In order for me to get started I need the attached estimate signed and returned in addition to ____ (their logo files, access to social media, professional photos, etc.)



Links to Additional Resources:

- [9 Ways to make a GREAT first Impression](#)
- [Should I work for Free?](#)
- [Fast, Cheap, Great, FREE poster](#)
- [12 Steps to conducting client meetings like a Boss](#)
- [How to rock your first client meeting](#)
- [10 things to remember when meeting a client for the first time](#)
- [How to ensure a potential client is a good fit](#)