
THE **ONLY** DISCOVERY GUIDE YOU
WILL **EVER** NEED

THE
PERFECT
FIRST
MEETING

GEORGE STORM

BY BREAK THE BOX

INTRODUCTION

Hi, I'm George Storm.

I have spend more than half my life in a variety of Sales roles. From real estate, insurance and credit cards to training, telecom and SaaS.

I have worked in virtually all roles, from SDR to Head of Sales to VP Sales and Customer Success with my last roles being VP Sales Enablement and CEO.

I have a passion for Enterprise Sales and had the pleasure to have done projects with several fortune 500 brands across the world.

I have build several successful sales teams from scratch, opened up new segments and markets. To date I have trained over 1.000 people in sales execution.

Needless to say I am a full blown Sales Nerd. I always liked to read a lot of sales literature (I have read over 110 books on the topic) and learn new techniques and approaches to the art of selling.

I follow a strategy that is based on relationship building but is constantly supported and enhanced by data.

In my approach I focus on deep understanding of my customer's need and ruthless prioritisation.

In this guide I am sharing the methodology that affected my career and the performance of my teams the most over the years, a stellar First Meeting Structure.

Dive in and don't hesitate to reach out to me for questions and guidance.



INTRODUCTION:

THIS IS THE SINGLE MOST IMPORTANT SALES TOOL YOU WILL EVER USE. LEARNING HOW TO PROPERLY (DIS)QUALIFY AND EVALUATE A CASE WILL AFFECT YOUR WIN RATE MORE THAN ANYTHING ELSE .

Your First Meeting is the most pivotal moment of any Sales Process. How you perform, how much trust you are able to build, and, most importantly, how many relevant data points you are able to gather will make or break your deals.

Besides the fact that first impressions matter, for many buyers, investing time and effort in a first full-hour meeting with you or your company is already an investment enough, especially if you were the one reaching out to them.

If their first experience is poor, confusing, or doesn't create excitement and urgency, your process will stall at best, but more often, you will outright lose the deal.

I still remember, after almost 10 years, an old manager of mine instructing us to go back and do the first meeting AGAIN if the quality of information we received was not good enough. He reasoned that if the foundation is not solid, there's no reason to pour resources and time into a process that has very low chances of being fruitful. And, yes, I believe that your First Meeting is just **that** important.

Most people go out of a First Meeting saying, "It was a good session", "We had great conversations", or "There was some interest".

In my experience, these people didn't have a sales meeting; they had a social call with a friend.

Don't be like these people!

Meeting preparation

Research



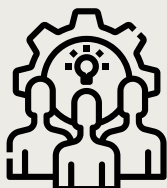
Research the company and the individuals you are meeting.

Make sure you know enough about what the company does, what their competition is, what their position is in the market, and what their marketing communicates. Look for values and targets primarily.

The focus, however, should primarily be on the people themselves as I assume you already know enough about the organisation.

Look at their LinkedIn feeds, resumes and articles they might have published. Try to get a feel for what they might be like in a session, what interests they have, and how they express themselves.

Industry



Make sure that you understand the industry they operate in.

What challenges do similar companies face? Not only related to what you can solve but from a broader view.

Look for news on the industry, recent developments, legislation and major competitor updates. The more you understand their environment, the more you can understand what they are about to ask you.

Also, showing at least a basic understanding of their environment will give you enough trustworthiness to be entrusted with a genuine dialogue.

If you feel lost in the session, it will show.

Prepare your audience Share your agenda at least 24 hours before the session.



Not in the calendar invite, instead use a normal email and give them a detailed view of what to expect in the session.

Do you want them to answer specific questions for you? (the answer to this is always yes, otherwise, I am not sure why are you even meeting them).

Give them a heads-up so they can come prepared. You don't need to make your questions too heavy but it's best if you prepare your attendees about what topics you will be asking about.

Meeting preparation

standard agenda

I wish I could say that having a meeting agenda is a self-explanatory thing but unfortunately, I would be lying to you!

A lot of salespeople either forget to add an agenda at all or chose to opt in for some vague 3 step template that says nothing about what's to come. Don't make the same mistake, take your time and your prospect's time seriously. Set a clear agenda and make sure to communicate it beforehand.

- **Introductions** (roles and areas of interest)
- **Needs Analysis** (main discovery)
- **Company presentation**(your company)
- **Suggested solution** (preliminary pitch)
- **Next steps** (set next session and roadmap)

Notes:

- Ask all participants if the agenda covers what they are looking for and ask them to submit further topics or questions that they might have.
- Brand your presentation with the customer's logo.

If you are selling **software**:

If you plan to run a demo, make sure it's adapted to what they want to see.
If you cannot be certain,

DON'T DEMO.

Honestly, even if you are certain, it's better to avoid Demos in your first session. I know many people would passionately defend demoing in the first meeting and to put it plainly:

These people are wrong.

Introduction

After our preparation, we are looking at the segments of our Agenda one by one. What needs to be in each one and how starting with the **Introduction**.

And this is already one of the segments that the majority of people **go wrong**.

Pleasantries, jokes, and talking about the weather in each country (I would be fine if NO ONE ever asked me about the weather again in a meeting) are decent ways to break the ice. Still, most people forget what the purpose of a proper introduction to a meeting is.

Our first goal here is to **Identify personas and dynamics**.

The main objective is to identify each person's **fundamental interest**. (*personal note: Very often, their interest doesn't necessarily correlate with their title; I have seen IT managers being super interested in legal and sales and asking about IT security. The point is – you need to know.)

Not the company's interest, not their department's interest, not just their KPIs.

THEIR personal interest.

What are **their** goals, aspirations, and issues?

This step is **crucial** to understanding what you should focus on during your presentation. It will help you stay interested and maintain rapport throughout the meeting.

From what I have seen, this is the most critical step in the process.

If you **fail** to get relevant information here, you are running a lot of risks:

Misinterpreting their interest, missing key points, failing to address essential concerns, and failing to identify stakeholders are just a few that I have encountered personally.

Last but not least, it is essential to identify each individual's personal targets and what they want to achieve in the next quarter/ year.

This is the **second most crucial step** in a first meeting.

Needs analysis

The (dis)qualification stage

Once you have understood the objectives and goals of the people sitting across the room from you, it's time to see if what you're proposing has a shot to be a good fit for your prospect.

At this stage, you need to have the mentality that **you are looking to disqualify** the prospect and then work backward from there.

Basically, you will need to prove to each other that investing time in evaluating a possible collaboration is worthwhile.

What I usually say in this step goes like this, word by word:

“

Thank you, everyone,
for a great intro; now, this next step will be an interrogation.
I will ask you a lot of questions to ensure that both your and
my time are well invested. I only want us to proceed from
here if we are confident we are a good match.

”

That has always helped me set the tone of what's to come, plus I have already prepared my prospect for the questions that I am about to ask.

Then, you really need to be prepared to disqualify and be honest with your prospect if you don't see a clear fit.

Stretching your solution or service to barely fit the requirement will only lead you to a ton of **dead pipelines**.

You are asking questions to understand their actual needs that you can address, the size of the different opportunities, and their ambitions and KPIs as individuals, departments, and organizations.

Once you have asked enough questions, you will be able to diagnose whether their idea is the right one, whether some other case should be the target, or whether this deal risks being a complete waste of time.

Needs analysis

The (dis)qualification stage

You need to dare to challenge the prospect's assumptions and disqualify them at this stage if the spec is not the right fit for your offer.

Understanding **why** you need to deliver, **how** and **what** (in that order) is the guide for how the process will go and whether it will succeed or fail.

You cannot bypass that step!

If you fail to gather enough information, the only option is to repeat the stage.

I understand that there are significant differences between inbound and outbound meetings.

Most people are scared to challenge their prospects when they have to convince them to take the meeting in the first place. But again, this is how you end up with a lot of stale or completely dead pipelines.

I will not attempt to give you a question battery here as what should be in it varies immensely depending on what you are selling.

*If you need help to put together yours, feel free to reach out to me

When asking questions, you need to follow the above baseline, but make sure that you actively listen to the answers, repeat them, and challenge and develop their ideas.

The battery will be meant to inform you of examples, not a script you use in meetings.

I will admit that this is a hard step to master.

A good rule of thumb to understand if you're on a good track on this evaluation is to ask yourself the following after each session:

Do I know:

- Why did they sit down with you in the first place?
- What issue are they looking to solve/improve? Why?
- Are you able to guide them to a solution?
- Why are you the BEST person to guide them there?
- What happens if they don't solve it?
- What happens to each participant's career if they don't solve it?

Needs analysis

The (dis)qualification stage

Here's where I need you to look yourself in the mirror and be 100% honest with yourself. Not your manager, yourself.

- Do you know ALL the answers?
- Are you confident in them?
- If your answers feel unclear or fluffy, you don't have enough info.
- If you feel yourself stretching the answers, you don't have enough info.
- If you feel insecure about any of the answers, you don't have enough info.
- If you feel that you have answers for the company but not about the individuals, you don't have enough info.
- If you are missing any of the answers completely, you had a bad meeting, and **you need to do it again.**

This step will determine your project's momentum and trajectory. Getting it wrong will unavoidably create clutter in your pipeline.

If you don't grasp **Urgency**, **Importance**, and **Solution Fit**, your chances of closing the deal are slim.

This is a hard step to master as it takes practice and ruthless honesty.

Company presentation

The first performance check

Now that (hopefully) you know enough information about your prospect, you can proceed to present your company or yourself if you're a freelancer/consultant.

My main advice here: **Whatever “Full Presentation” your Marketing department has given you, throw it out!**

You want to present just enough information to create trust in your ability to deliver what they need. No one cares how many offices you have in how many countries, when your company started, or who's investing in you.

Your only goal here is to introduce your business IN ORDER to transition to how you can solve the issue you have identified in the previous step.

This segment is your first performance check: The level of interest at this point is your benchmark for judging your work in the previous two steps.

Focus on Brand USPs. Refer to relevant projects. Show the full portfolio overview, but don't go into product details. Utilise any quotes you can from the previous step to create relevance. As an example:

“

As you said earlier, Sara, Forecast Metrics are crucial to track, and this is what we focused on when we first started working with X and Y customers.

”

This segment should be **minimal**. Its only purpose is to build trust in our ability to deliver high-quality results and our experience undertaking similar projects in their segment.

Logo slides should be used to explain why, not on whom. Talk about decision criteria, risks and similarities.

If you don't have relevant cases, you are better off ditching your logo slide altogether.

Solution suggestion

Connecting the dots ...

Please note:

Not all cases will result in having a solution at hand during the first needs analysis. If you can't find a fit, avoid recommending one. Gather more info on the goals and requirements, get back to your team and your manager, and come back with a well-fitted solution.

After closing the company presentation, we go to a very high-level solution sketch.

Here, you discuss with the customer what the right solution could be and what the proper process should be in implementing it.

Once you have a mutual agreement, you need to get their **timeline**:

When do they expect to make a decision; when do they want to start; and what obstacles do they see in getting there (budget, other people in the company, etc.)

When you recommend prioritized solutions that:

- Fit the case, aiming for minimal invasiveness to the customer's way of working.
- Result in the least amount of friction with competitors. If you have a unique solution to the problem, aim for that.

Depending on your findings, you should combine adjacent solutions from your portfolio based on case knowledge and ideation.

I can't instruct you on how to present your solution; that is something you need to **own** and remember by heart if you are woken up in the middle of the night.

Own the entire portfolio of your business's offerings and train yourself to be creative in matching and tailoring solutions where possible.

Once you have agreed on where to go next, then...

Next steps

Painting a promising picture

Ok, we're at the final stretch now.

But this is not the stage to relax; there's plenty to screw up here too!

What you need to do here is an information swap:

You provide what you have gathered so far, enhanced with your expertise, painting a picture of what the solution **vision** looks like.

In return, you are asking for further information from the prospect to make that vision a reality.

If you did a decent job in the previous five steps, by now, you should know and present the following:

- Solution **vision** (what solution are they buying)
- Partnership **vision** (who is the company, and how will you work together)
- Obstacle **vision** (what are the problems that you will help them overcome)
- Process **vision** (how do we overcome those obstacles, timing, etc.)

One thing that is **crucial** here is to delegate clear action points to each party and display a commitment to delivering those points in time.

In my experience, all roadmaps are completely useless – no matter how detailed they are – without deadlines and clear next steps.

What you need to ask your prospect at this stage:

- Are they building a business case?
- What is their next step for them after this session?
- Is there an evaluation meeting?
- Do they have a demand spec?
- What are the decision criteria?
- Who is leading the project?
- Who will be the system owner (if applicable)?

And once again, **don't leave the session without this information.**

Wrapping up

no next meeting, no case

Yep, you read that right. If there is no second meeting, there is no case. **Close the deal as lost.**

Even today, I actively say this in any prospect, partner, or other session if I sell anything.

“

If we can't plan our next session at this stage, it seems we are not a good fit for each other. I respect your time and mine, so let's call it a day.

”

Sounds abrupt? You'd be surprised how many people respond positively to that level of honesty.

Why? Because the truth is that at this stage, we can either agree that we need a session, agree that we have no case, or iron out the questions that are blocking us from proceeding.

As a manager, I manually closed lost all deals that had no next meetings planned, weekly.

So, there's no reason not to have the next session booked unless the case is disqualified.

You should learn to prefer a lost case to one that drags out to no end.

Even if it's a 15m follow-up for status, you **need** to exit with the next session booked.

Announce that you will send a summary of what was discussed within the day.

If for **any reason** (travel-full schedule-life) you cannot do that within the day, explain that to the prospect and announce when they should expect your follow-up.

Do not under any circumstances **underdeliver** on this timeframe, as it sets the tone for the rest of the collaboration.

Trust is hard to build and easy to lose. **Start with consistency.**

Post-meeting

establishing trust early

Ok, you are done with your session, on to the next one, **right?**

Oh, my friend, *you couldn't be more **wrong!***

Let's start with the fact that you should never book back-to-back meetings. Always allow 15–20 minutes after each session to wrap up your notes and deliver what you promised.

Delivering material is the first promise that you made to your prospect, and this is not the time to start damaging any trust you managed to build during the session.

So, plan your time accordingly so you have the space to do what you need to after each session.

In detail, after each meeting, you should:

- Sum up your meeting notes.
- Answer any pending questions. If you need answers internally, inform the prospect that you have asked for assistance and will get back to them. **Don't wait** for input before you follow up.
- Send your presentation and any other material you have communicated that you will provide.
- Ask for confirmation on the next steps you have agreed upon.
- The SLA for a meeting follow-up needs to be within the same day unless there's a reason for being unable to deliver on that. If there is, inform upfront.

Getting into a habit of doing this after every session will help you build trust in your delivery and ability but it will also help you keep control of your tasks and make sure you know each case you are driving in detail.

It's a great way to keep yourself from getting overwhelmed after a busy day and completely forget wtf you talked about, what you promised and what you're supposed to be doing.

And trust me, the last thing you want to do is start your first email by saying "Apologies for the delay, I forgot to hit send" or whatever other lame excuse you use.

Universal rules

mastering all types of meetings

In this segment, I want to share some pointers that apply primarily to First Meetings but can apply to any session you might have.

After 22+ years as both a Sales rep and a Manager, I've screwed up a lot!

As I used to say to my teams: *"I've made all the mistakes I could, so you don't have to"*

With that in mind, let me give you some additional advice on how to master the structure and logic behind all meetings:

- **Take notes;** not only do you need to be able to summarise, but it's also essential for the rapport in the session – even online – to show that you are paying attention and noting down what they are saying. **Nodding and moving on to the next topic creates insecurity.**
- Ask follow-up questions, and **repeat the answers:** "Just so I am sure I understand, you said x."
- Always answer the question, "Why me?". **Why would they work with you?** What is it that makes you different from your competitors?
- **Always pause** for questions. Never go through a full slide or segment without ensuring the room follows you. If they look disengaged, ask them questions again. "Does that make sense? How would that impact X?" "Can you identify with that challenge? How?"
- **Never, ever** leave the follow-up to the prospect. Take charge and plan the following steps, asking for consensus.
- If you don't have the answer to a question, be transparent, communicate that you don't have enough information, and get back to them with detailed answers. **Avoid platitudes and inaccuracies at all costs.**
- Learn to **sense the room** and look for engagement signals. Getting questions is an excellent sign that people are paying attention. If you feel you are losing the room, pause, ask questions and ask if what you are covering is relevant to them. If not, skip the segment.

You lead the way

take full control of your time

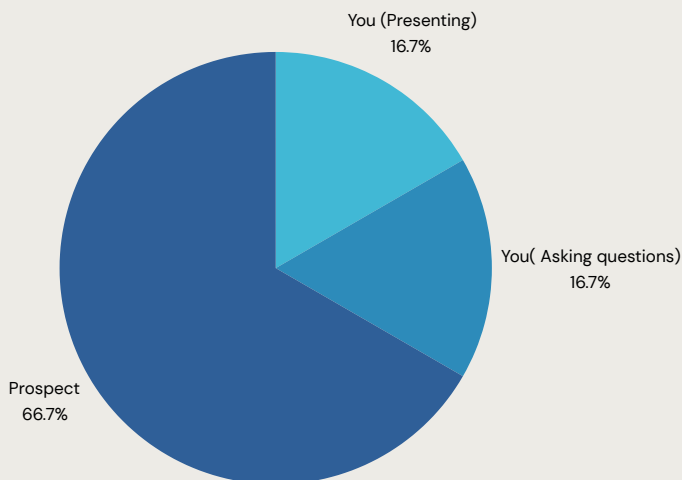
One of the most important things you need to learn, not only for meetings but for your entire career, is to own your time. You lead the meeting, the flow of conversation, and the exchange of information. If you forget that role, you will have many unproductive conversations that might feel pleasant at the time but will leave you **and** the prospect confused and lost.

Control the meeting composition:

You have 60 minutes. As with everything else in this guide, there is a specific balance to how the composition of these 60 minutes should be. In particular:

- You can talk alone (present) for a maximum of 10 minutes. No more.
- The rest of your communication is limited to promoting the prospect to talk, asking questions, and expanding on their answers. Another 10 minutes.
- The rest of the time, it should be the prospect speaking.

So, if we look at it as a chart of shared “stage” time between the two parties:



You lead the way

take full control of your time

if you think this is too restrictive, that's a **red flag** for how you do First Meetings now. These sessions are for your prospect, **not for you**. The info about your company or what you do is only relevant in correlation to what your prospect wants to solve.

If you plan to implement this loosely, it won't work. The time slots are calculated after years of refining what gives the optimal results, so follow the structure exactly if you want to see results. To achieve that, you need to:

Time yourself

You don't need fancy platforms in your CRM to do that. Use your phone and time how long each segment takes. You need to know how much each topic takes you to cover.

So, start setting your timer when you do meetings and clock the segments.

If you don't want to do it live, you should do it when you watch your recorded sessions. Which brings me to my next point:

Record your meetings

If your company is not doing this already, do yourself a favour and record ALL your meetings. There's no better way to improve your performance than watching yourself perform. Watch your tonality, timing, delivery, and flow. Then, watch how each line lands with the prospect. How do they react, what lands well, which jokes do they laugh at, and which segments fall flat?

Most people drone through their meetings and wonder why their results are not improving. Take control of your performance and own it 100%.

Try new approaches, cut what doesn't work, and test, test, test, and test again!

Be ruthless with yourself if you want to improve; no one gets anything perfect the first time or the first 100 times.

But if you dedicate yourself to becoming a great speaker and moderator, the changes you will see in your career will be immense.

Things to avoid

learn how to navigate pitfalls

Now that we've looked at all the things you should be doing, let's have a look at all the things you should be avoiding like the plague:

Pricing discussions:

When neither you nor the prospect has settled on what solution you are even considering, avoid pricing discussions.

You will get pushed at times, and that's okay.

You can explain that you need to know more to give a sane picture of the cost. If they insist, don't be stubborn. Give them a range and clarify that you will get more specific once you have more data points.

Demos (for software sales) :

This has been a hot topic of debate in sales cycles for years. If you are working in Sales, your job is to evaluate, guide and expand on ideas and concepts.

You are not an extension of your marketing department.

Don't demo in the first meeting.

The risk you are running of showing something of low to no relevance to the need is very high. If you do, there's a good chance the prospect loses all interest in your solution and disengages.

Book a solution meeting with the explicit purpose of going through your solution. Your first meeting is about mutual evaluation and the goal is to gather information.

Comparisons with competitors:

They are completely useless.

Never compare yourself to competitors willingly. Never mention them yourself.

Things to avoid

learn how to navigate pitfalls

I used to get leads steadily for years from reps who mentioned my company in a comparison slide. Even prospects that had never heard of us at the time got interested because our competitors insisted on talking about how they compare.

If you are asked, the best answer is along the lines of:

"Each company/service has its USPs; I really don't know enough about X competitor to produce a side-by-side comparison. My aim here is to evaluate if we are a good fit."

Even more importantly, **never ever talk negatively about your competitors.** It's petty, and it makes you look junior. No serious prospect will appreciate that behavior; you will lower your standing.

Not to mention that it's just flat-out poor form.

Extensive dialogues on details:

This is a luxury problem but still a problem. If you start getting questions that go into extreme detail, you are in a good spot as your prospect is engaged.

That's good.

But don't forget that you have 60 minutes to evaluate the case and deliver your message. If you get bogged down by overly detailed dialogues at this stage, you will end your session with both you and your prospect missing a bunch of information.

No one wants to end their first meeting hearing:

"Well, we run out of time; I need to jump to the next session; email me."

Challenges

mastering anything takes time

Look, mastering this structure will completely transform your pipeline and your win rate.

Mastering it would mean hitting all the notes all the time.

So, you should be able to get **all the information** you need, build **trust**, and develop a ruthless disqualification routine in **every meeting**.

And you need to be able to do that in 60 minutes or less.

But I am not going to lie to you and say that it's an easy thing to do.

Nailing all the steps efficiently in 60 minutes requires a lot of refining and practice.

Until you master the art of the first meeting, all your subsequent efforts will be hugely inefficient.

Please take time to think of this:

Your first meeting decides the direction of the relationship. If you want to change direction, basically, **the only remedy is to go back to Step 1** and redo that first meeting, however painful and humbling it may be.

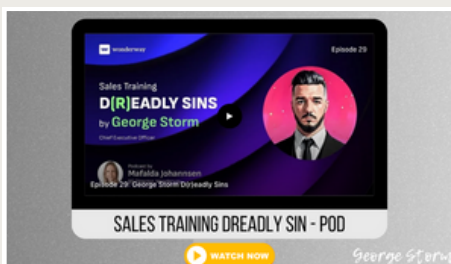
The number one reason for failure somewhere down the process is that the salesperson failed to properly do one or multiple of the steps.

Before you have mastered step 1, the rest will suck.

It's like building a house on sinking sand. First, build the foundation (of the relationship), then build the house. Not the other way around.

EXIT

More resources



Thank you for reading!

Reach out for further advice

for more of my content,
follow me on social:



WWW.BREAKTHEBOX.SE

A large, stylized handwritten signature of George Storm.

