

PERIODIC BUSINESS REVIEWS

convergo

APPROACH YOUR PBRs WITH A HELPFUL MINDSET

PROPOSING/CLOSING CALL: OBJECTIVES

- If you don't help them, they won't let you back in
- Be interested before being interesting
- Truly listen
- Look to solve a problem
- Be helpful in ways they would not expect

STRUCTURING YOUR BUSINESS REVIEW

1) Personal connection
2) State of the business
3) Highlights from last meeting
4) Outcomes realized (SPF)
5) Idea sharing
6) Summarize meeting output
7) Referral exchange
8) Schedule the next one

WHAT CAN YOU DO TO PREPARE?

- Look at social touchpoints of company and individuals
- Research industry
- Look at Outcomes Framework from the client's lense
- Prepare to recap highlights and action items from last meeting

WHAT CAN YOU DO NOW?

- Prioritize your clients and determine PBR cadence
- Document your PBR Process
- Develop your PBR PPT
- Consider a Client Loyalty Program to launch your PBR Program
- Keep your Outcomes Framework updated
- Just do it!