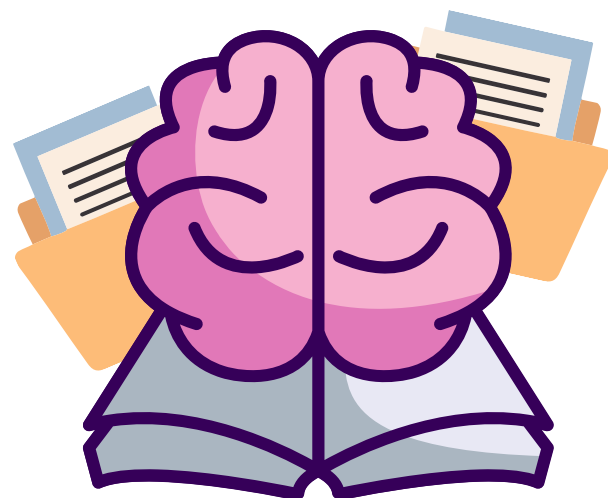


How to Get The Best Results from An Initial New or Prospective Client Meeting

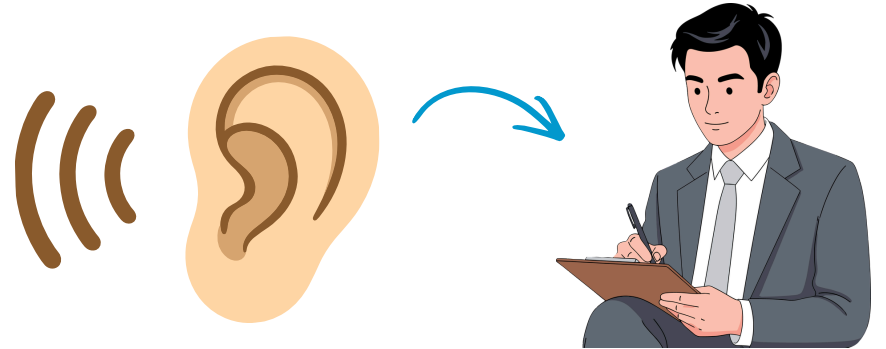
BEFORE THE MEETING

- 1** Run conflicts first -- legal, matter-level, and business. Then begin your research.
- 2** Use an LLM with web search to create a company briefing. Give it a structured prompt: "I have a meeting with [Name, Title] at [Company]. Research the past 12 months and create a brief covering recent news, leadership changes, lawsuits filed by or against the company, major deals, regulatory developments, and relevant industry trends." This single step replaces hours of manual searching.
- 3** Go deeper with follow-up prompts. Ask the LLM to search specifically for patent litigation, recent public statements by the person you are meeting, their LinkedIn activity, and any speaking engagements or publications. Layered research in a single conversation catches details a broad query misses.
- 4** Turn your research into questions. This is the step most people skip, and it matters the most. Preparing thoughtful questions forces you out of your own head and into the client's reality. Ask the LLM to suggest 5-7 questions based on what it found.
- 5** Cross-reference key facts. LLMs are strong at synthesizing publicly available information, but verify litigation data and financial figures against primary sources like court records, SEC filings, or the company's own press releases.
- 6** Embed all meeting details -- contact info, location, directions -- into your phone so you can call ahead if something comes up.
- 7** Coordinate internally. Know who else at your firm has a relationship with this person or company before you walk in the door.



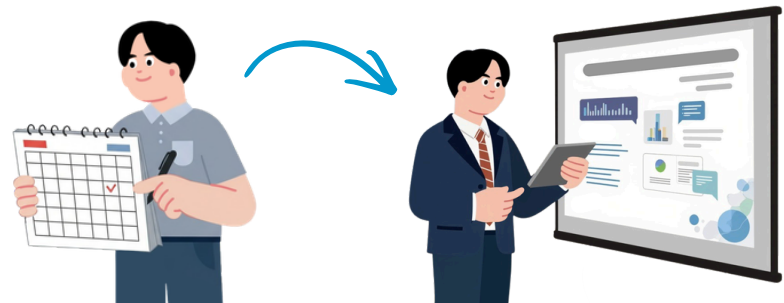
DURING THE MEETING

- 8 Be on time. Arriving late signals that something else was more important. If you are going to be late, call ahead.
- 9 Greet everyone professionally -- not just your contact. The receptionist, the paralegal, the assistant. Every person in that organization can influence a hiring decision.
- 10 Be 100% present. Turn off your phone. Ask how they are and actually listen. Start with 3-10 minutes of genuine conversation before turning to business.
- 11 Ask, don't tell. Use your prepared questions. Be engaging and interactive, not robotic or canned. Clients and prospects can tell immediately when someone has done their homework versus when they are winging it.
- 12 Provide value during the conversation. Share relevant experience. Bring options. Show, don't just tell.
- 13 Take detailed notes. Use a split technique: substantive details on one side, personal details (family, vacation plans, interests) on the other. If taking notes during the meeting is not natural for you, stop in the lobby on the way out and capture everything before you lose it



AFTER THE MEETING

- 14 Follow up using your notes. Act on what you learned. Send what you promised. Connect them with a resource.
- 15 Log personal details into your CRM or contacts. These details build the relationship over time.
- 16 Use an LLM to draft your follow-up communications. Upload your notes and ask it to draft a thank-you email, a summary of discussed next steps, or a brief with additional information you promised to send.
- 17 Schedule your next move. Set a calendar reminder in 1-2 weeks to review your notes and plan the next contact.
- 18 Debrief and improve. Reflect on what went well, what questions landed, and what you would do differently next time.



Roughly 80% of winning any pitch or meeting is attributed to preparation, research, and follow-up.

Only about **20%** comes from what happens in the room itself.

AI tools now make it possible to do that preparation in a fraction of the time it used to take

The professionals who build this into their routine will consistently outperform those who do not.