



In the Right Place at the Right Time

Recently I have enjoyed a few conversations about the choice of location for specific meetings. The first thing that struck me is that many advisers are creatures of habit - or perhaps it is better expressed that they are comfortable with their current business practices. I hope to challenge those habits (or practices) and ensure that your choice of location is conscious and deliberate – and appropriate.

Important business meetings will certainly take place with team members, suppliers, referral partners and other professionals. I will revisit the question of suitable locations for meetings with these people in a future column and reserve this column for client meetings.

Let's look at some options for locations:

- In your office, which may mean a meeting room or it may mean an actual office
- Certain meetings may take place in a café or a restaurant
- Some client meetings apparently take place in the client's home or office

The fundamental assumption I am relying on is that you are a professional working in a professional business. With that in mind let's address each of the options and determine the circumstances in which it may be suitable:

Your Office

This should be the default venue for client meetings as clients would expect to meet their professional advisers in the professional environment of their business address. I will outline some exceptions but initial meetings (aka Discovery meetings), review meetings (aka Progress meetings) and any meetings relating to implementation should all take place at your business address.

Now let's be specific here. Those client meetings I have listed should take place in a meeting room. Please resist the temptation when meeting rooms are in demand to conduct your meeting in your working office. It is not a suitable venue. It carries a confidentiality risk even if your desk is usually clear. It encourages rapport conversations, rather than trust conversations, because of the clues in your office about you. It also carries the risk of distraction or interruption, even with your door closed and your PC turned off. Don't do it!



Café or Restaurant

If you refuse to meet clients in “social” venues I want you to think again. If you often meet clients in social venues you are probably overdoing it.

When should you meet in a café or restaurant? These are definitely suitable for “ideal client meetings”. These are the occasions when you invite your favourite clients for a conversation about their experience as a client of your firm. It’s really a personal market research meeting. It may also be an opportunity to thank your client for referrals. This is a relationship oriented event and so, to differentiate purpose, it should not be held in your meeting room. If you want to combine a review meeting with a market research meeting, I suggest you undertake the former in your meeting room and then relocate to the café/restaurant for the latter.

I know that some advisers like to have a “pre-meeting meeting” with prospects over coffee to determine whether or not to proceed with a Discovery meeting. Don’t. Find another filtering method or practice saying “no” after 15 minutes of the Discovery meeting. First impressions are critical and so I urge you to make a professional impression by conducting your initial meetings in a professional environment using your professional Discovery skills.

Client’s Home or Office

I know that some advisers are happy to meet their clients at their clients’ home/office. They tell me that it is more convenient for their clients. They tell me that it saves time for their busy, important clients. I tell them that professionals don’t make house calls. My orthopaedic surgeon would have laughed if I suggested that she visit me - even though I was very busy and found it difficult to walk.

It’s not just the professional image that is at stake here. If you choose to play on their home ground you have lost control of the environment and, potentially, control of the meeting. You are also at risk of distraction and interruption as well as the risk of switching to “rapport mode”. Don’t do it. If they are not prepared to visit you what makes you think that they will be prepared to take your advice?

These are the best of times to consciously and deliberately choose the right location for all of your client meetings.