

First Meeting with a New Client

The fact that a busy person has agreed to meet with you means they are interested in your services. While there is no guarantee that you will get a particular client or project, if they have a need for your services and are meeting with you, you have a good chance of getting their business.

Where to Meet

If you are fortunate enough to have an office outside your home, and it is a nicely decorated space, by all means have the consultation in your office. You will be close to all of the materials you've gathered during your research and learning stage and you'll be able to answer questions with **pictures** as well as **words**.

Similarly, if you have a home office that is nicely decorated and free from interruptions (i.e. no children, barking dogs, etc.), you are licensed to have a home-based business, and the client is comfortable meeting in your home, have the meeting there.

If, on the other hand, you do not have either of these spaces available to you, you should meet at a spot you know will allow you to have a fairly private and uninterrupted conversation. If the event is a private party and the client is comfortable with it, you could have the meeting at **their home** or in a private room of a **restaurant**. However, if the event is a corporate event, it would be a good idea to hold the meeting at the client's office.

What to Bring to the Meeting

At the initial consultation, the client will want to see **examples** of your work, **letters of recommendation** and any other credentials that would illustrate your ability to plan the client's event — in other words, all of the materials you will have in your prepared portfolio. Here are some additional items an organized event planner would bring to a client meeting:

- Your **brochure** or other marketing materials
- **References** from past clients (family or friends included)
- Your **business cards**
- A two-year **calendar** or date book that includes the following year
- A blank **contract**
- A spreadsheet with **estimated budgets** for different sizes/types of events
- A **calculator**

Although this initial consultation may be seen only as an opportunity for the client to assess whether they want to hire you as their event planner, it is a good idea to come prepared to write up a contract.

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