



EXPECTATIONS

Email/ text client day before meeting to be sure they know what deliverables are their responsibility. Confirm appt. time + tech to minimize surprises and wasted time.



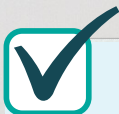
GOALS

Check that your deliverables are ready to meet the goals of this appt. And check overall client goals to confirm that the work in hand ties to those larger objectives. This will help keep you both on track.



TOOLS

Check your favorite SEO/ranking tools to understand any movement that has occurred since the last report or appt. Don't forget to take screenshots or export any novel data you encounter.



SERPS

Spot check the SERPs to manually confirm suspected ranking movements and to notice any new SERP features or elements that have cropped up since your last appt. New opportunities can exist in these findings.



REVIEWS

Gauge client's offline health by looking through the reviews they've received since your last meeting. Raise concerns or offer praise accordingly.



CLIENT MEETING CHECKLIST



LOCAL SEO NEWS

Check local SEO news to know if any new issues may be impacting client since last appt. You'll be prepared to answer questions on the spot if new issues have arisen for them, because you're keeping current.



MKT/IND NEWS

Check market and industry news for client, with an eye to spotting opportunities and challenges that may uniquely apply to their business. This demonstrates commitment to brand success.



PERSONAL FILE

Review notes on what your client has shared about their personal life, affinities, causes, and notable events. This shows that you care enough about your relationship to remember what matters to them.