Prepare for Local Client Meetings — in — 8 Steps

1 Check expectations

- Message your client the day before the meeting to be sure they know what deliverables are their responsibility.
- Confirm the appointment time and tech (e.g., the meeting link or location) to minimize surprises and wasted time.

2 Check goals

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

3 Check tools

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

4 Check SERPs

- Spot-check the SERPS to manually confirm any suspected ranking movement and any new SERP features or elements that have been included in SERPs since your last appointment.
- Identify opportunities in the findings

5 Check reviews

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

6 Check local SEO news

- Check your favorite local SEO news sources to see if any new issues have affected your client since your last appointment.
- Be prepared to answer questions on the spot if new issues have come up for them by keeping current.

7 Check market and industry news

- Check market and industry news for your client to spot potential opportunities and challenges that may uniquely apply to their business.
- Demonstrate a commitment to their brand's success.

8 Check client personal file

- Review notes on what you've learned about the client's personal life, style, affinities, habits, and notable events that they've shared with you.
  This demonstrates that you care enough about your relationship to remember what matters to them.

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From the Moz Blog: _8 Prep Steps for Better Local Business Client Meetings_ by Miriam Ellis