KNOW YOUR VALUE

First Meeting Review

A checklist, a worked example and a question guide

Most fees are decided before the proposal is written. They're decided in the first meeting: by whether you spoke to the right person, understood why the client needs this now, and connected your work to results they care about.

This review helps you see, honestly and quickly, what that first meeting gave you, and what's still missing before you put a price on paper. It works whatever you do and wherever you work, whether you're an independent, a small practice or part of a larger firm.

What's in this pack

Part 1	**The checklist** Seventeen questions to complete within a day of a first meeting, while it's still fresh.
Part 2	**A worked example** A completed review of a fictional meeting, with my commentary on what the answers reveal.
Part 3	**Turning "No" into better questions** For every gap you find, a question to ask the client, or yourself, before the proposal.

How to use it

Tick one box for each question and add a note where it helps. Then count your answers. There's no pass mark. Every "No" or "Partly" is not a failure; it's a question to answer before the client sees the gap in your proposal. If this is your first time, read the worked example in Part 2 before you start.

PART 1

The checklist

Complete within a day of your first meeting

Client	Meeting date	Who attended

#	Question	Yes	Partly	No	Notes
1. The meeting *Did it move things forward?*					
1	**Are you clear on what the client wants to achieve?** *If you can't state their objective in one sentence, you can't price against it.*	☐	☐	☐	
2	**Did you agree the next step before the meeting ended?** *A meeting without an agreed next step is a conversation, not progress.*	☐	☐	☐	
3	**Did you book the next meeting while you were still together?** *It's far easier to agree a date in the room than to chase one by email.*	☐	☐	☐	
2. Who decides *Are you talking to the right people?*					
4	**Did you speak to the person who will make the decision?** *Value is easiest to agree with the person who owns the budget and the outcome.*	☐	☐	☐	
5	**Do you know who else is involved, and the role each person plays?** *For each person: decision-maker, influencer or gatekeeper? A committee, a head of department, a director?*	☐	☐	☐	
3. Why now, why you *Is there a real reason to act?*					
6	**Do you know why they are doing this now?** *Urgency comes from the client's situation, not from your deadline.*	☐	☐	☐	
7	**Did you discuss the risks, including the risk of doing nothing?** *The cost of standing still is often the strongest case for your fee.*	☐	☐	☐	
8	**Do you know why they would choose you over the alternatives?** *Including other providers, doing it in-house, or not doing it at all.*	☐	☐	☐	
4. Value *Can you connect your work to their results?*					

#	Question	Yes	Partly	No	Notes
9	**Did you ask how the client will measure success?** *Use their measures, in their words. Not yours.*	☐	☐	☐	
10	**Can you show the return on their investment, in their terms?** *A fee feels high only when it isn't connected to an outcome.*	☐	☐	☐	
11	**Do you have evidence from past work that you can deliver this?** *Specific results from similar clients make the value believable.*	☐	☐	☐	
5. Fees and the proposal *Are you charging for the value you create?*					
12	**Did you discuss fees during the meeting?** *Clients expect to talk about investment. Avoiding it creates surprises later.*	☐	☐	☐	
13	**Did you avoid discounting, or naming a fee before you understood the value?** *An early number anchors the conversation and leaves money on the table.*	☐	☐	☐	
14	**Will your proposal offer options with increasing value?** *Give them a choice of how to work with you, not a yes-or-no on one price.*	☐	☐	☐	
15	**Is the project profitable for you at the fee you have in mind?** *Include your time, any associates, and the work clients never see.*	☐	☐	☐	
6. Fit and delivery *Should you take this on?*					
16	**Is this client a good fit for you?** *Think about values, ambition and how they treat suppliers, as well as budget.*	☐	☐	☐	
17	**Do you know who you need to help you deliver this well?** *Line up associates or partners before you commit to a timeline.*	☐	☐	☐	

Your score

Count your answers in each column.

Yes	Partly	No
____ / 17	____ / 17	____ / 17

Reflect

What went well?

What did you do that you want to repeat in every first meeting?

What would you do differently next time?

Be specific: a question you didn't ask, a moment you rushed, a point you didn't press.

The one thing to resolve before you write the proposal

Look at your "No" and "Partly" answers. Which one matters most?

PART 2

A worked example

A fictional first meeting, reviewed

Jordan is an independent marketing consultant. Jordan met Priya, the operations director of a 60-person architecture practice, to discuss how the practice presents itself when it bids for public-sector work. The people and the practice are fictional, but the patterns are ones that come up again and again.

Client	Meeting date	Who attended
Architecture practice (fictional)	*Day after the meeting*	*Jordan; Priya, Operations Director*

#	Question	Yes	Partly	No	Notes
1. The meeting *Did it move things forward?*					
1	**Are you clear on what the client wants to achieve?** *If you can't state their objective in one sentence, you can't price against it.*	☒	☐	☐	*Win more public-sector work over the next two years.*
2	**Did you agree the next step before the meeting ended?** *A meeting without an agreed next step is a conversation, not progress.*	☒	☐	☐	*Agreed I'll send a one-page summary of what I heard by Friday.*
3	**Did you book the next meeting while you were still together?** *It's far easier to agree a date in the room than to chase one by email.*	☐	☐	☒	*Said I'd email some dates. Should have booked it there and then.*
2. Who decides *Are you talking to the right people?*					
4	**Did you speak to the person who will make the decision?** *Value is easiest to agree with the person who owns the budget and the outcome.*	☐	☒	☐	*Priya runs operations. The managing partner signs off on spend at this level.*
5	**Do you know who else is involved, and the role each person plays?** *For each person: decision-maker, influencer or gatekeeper? A committee, a head of department, a director?*	☐	☒	☐	*Managing partner decides. Priya influences. The bid team lead may be a gatekeeper.*
3. Why now, why you *Is there a real reason to act?*					
6	**Do you know why they are doing this now?** *Urgency comes from the client's situation, not from your deadline.*	☒	☐	☐	*Two major tenders open next spring, and recent bids have lost on presentation.*
7	**Did you discuss the risks, including the risk of doing nothing?** *The cost of standing still is often the strongest case for your fee.*	☐	☐	☒	*We didn't talk about what happens if nothing changes.*
8	**Do you know why they would choose you over the alternatives?** *Including other providers, doing it in-house, or not doing it at all.*	☐	☒	☐	*They like that I've worked with practices before. Didn't ask who else they're talking to.*

#	Question	Yes	Partly	No	Notes
4. Value *Can you connect your work to their results?*					
9	**Did you ask how the client will measure success?** *Use their measures, in their words. Not yours.*	☐	☒	☐	*Tender win rate. We didn't agree what a good result would be.*
10	**Can you show the return on their investment, in their terms?** *A fee feels high only when it isn't connected to an outcome.*	☐	☐	☒	*Can't yet. I don't know what a typical contract is worth to them.*
11	**Do you have evidence from past work that you can deliver this?** *Specific results from similar clients make the value believable.*	☒	☐	☐	*Case study from a practice of a similar size with the same problem.*
5. Fees and the proposal *Are you charging for the value you create?*					
12	**Did you discuss fees during the meeting?** *Clients expect to talk about investment. Avoiding it creates surprises later.*	☐	☐	☒	*Ran out of time. Priya asked roughly what it would cost; I said I'd follow up.*
13	**Did you avoid discounting, or naming a fee before you understood the value?** *An early number anchors the conversation and leaves money on the table.*	☐	☒	☐	*Mentioned my day rate when pressed. Wish I hadn't.*
14	**Will your proposal offer options with increasing value?** *Give them a choice of how to work with you, not a yes-or-no on one price.*	☒	☐	☐	*Planning three: a review, a review plus bid support, and a full programme.*
15	**Is the project profitable for you at the fee you have in mind?** *Include your time, any associates, and the work clients never see.*	☐	☒	☐	*Probably, but not if I end up writing the bids myself.*
6. Fit and delivery *Should you take this on?*					
16	**Is this client a good fit for you?** *Think about values, ambition and how they treat suppliers, as well as budget.*	☒	☐	☐	*Collaborative, decides quickly, and has a reputation for paying on time.*
17	**Do you know who you need to help you deliver this well?** *Line up associates or partners before you commit to a timeline.*	☒	☐	☐	*I'll need an associate bid writer for the full programme.*

Jordan's score

Yes	Partly	No
7 / 17	**6 / 17**	**4 / 17**

Jordan’s reflection

What went well?

What did you do that you want to repeat in every first meeting?

Asking about their recent tenders early on. Priya opened up straight away.

What would you do differently next time?

Be specific: a question you didn’t ask, a moment you rushed, a point you didn’t press.

Book the next meeting before leaving. And don’t give a day rate just because I’m asked for a number.

The one thing to resolve before you write the proposal

Look at your “No” and “Partly” answers. Which one matters most?

Find out what a typical contract is worth to the practice, so I can show the return (question 10).

My commentary

Here's what I'd say to Jordan, section by section.

1. The meeting Jordan left with a clear objective and a next step, which is a strong start. But "I'll email some dates" is where momentum leaks away. Booking the next meeting in the room is one of the simplest habits to build, and one of the most valuable.
2. Who decides Priya is an influencer, not the decision-maker. That's normal in a first meeting. The risk is writing a proposal for Priya that will actually be judged by the managing partner. The next conversation should involve that person, or at least prepare Priya to make the case for you.
3. Why now, why you The urgency is real: two tenders next spring. What's missing is the cost of doing nothing. If Jordan can't describe what losing those tenders would mean for the practice, the fee will be judged on its own, rather than against that cost.
4. Value Question 10 is the gap that matters most. Without knowing what a typical contract is worth, Jordan can't show the return, so the fee will look like a cost rather than an investment. The good news: the evidence from past work is already there.
5. Fees and the proposal Naming a day rate under pressure is one of the most common slips. It anchors the conversation on time rather than outcomes. It's recoverable: three options, each tied to results, can move the conversation back to value.
6. Fit and delivery A good fit, with one honest flag. The work is only profitable if Jordan doesn't do the bid writing personally. Knowing that now shapes what goes into the full programme, and what it costs.

Overall: four "No" answers and six "Partly" answers don't mean the meeting went badly. They give Jordan a clear agenda for the next conversation, before the proposal is written, which is exactly when it's still easy to fix.

PART 3

Turning “No” into better questions

A short guide for every gap you find

A “No” usually means a question wasn’t asked, or wasn’t asked in a way the client could answer. For each question you marked “No” or “Partly”, here’s a better question for your next conversation. Some are for the client. Some are for you, because a few gaps can only be closed by your own thinking.

Use your own words. What matters is the intent behind the question, not the script.

#	If you answered No or Partly	Who to ask	A better question
1	**The objective isn’t clear**	*Ask the client*	“If this works brilliantly, what will be different a year from now?” “What would make this a success for you personally?”
2	**No next step agreed**	*Ask the client*	“What would be a sensible next step from here?” “Before we finish, shall we agree what happens next?”
3	**No next meeting booked**	*Ask the client*	“Let’s put a time in now. Would early next week or later in the week suit you better?”
4	**Not the decision-maker**	*Ask the client*	“Who else will want a say before this goes ahead?” “How would you like to involve them in our next conversation?”
5	**Roles unclear**	*Ask the client*	“Talk me through how a decision like this usually gets made here.” “Is there anyone who could stop this, even if everyone else agrees?”
6	**No clear reason for now**	*Ask the client*	“Why is this a priority now, rather than next year?” “What’s changed recently that made you pick up the phone?”
7	**Risk not discussed**	*Ask the client*	“What happens if nothing changes over the next twelve months?” “What worries you most about getting this wrong?”
8	**Unclear why you**	*Ask the client*	“What made you want to talk to me about this?” “Who else are you considering, including doing it yourselves?”
9	**No measure of success**	*Ask the client*	“How will you know this has worked?” “What would you measure, and what result would you be pleased with?”
10	**Can’t show the return**	*Ask the client*	“What is a typical client, contract or project worth to you?” “What does it cost you each time this problem shows up?”
11	**No evidence ready**	***Ask yourself***	“Where have I solved a problem like this before, and what changed for that client?” “Which result would this client find most convincing?”
12	**Fees not discussed**	*Ask the client*	“Have you set aside a budget or investment range for this?” “How do you usually decide whether an investment like this is worth it?”
13	**Named a fee too early**	*Ask the client*	“Before I put a figure on this, can I check I understand what it’s worth to you?” *To recover: “I mentioned a rough rate earlier. Now I understand more, I’d like to show you some options based on results instead.”*

#	If you answered No or Partly	Who to ask	A better question
14	**Only one option**	***Ask yourself***	“What would a focused, a core and a fuller version of this work look like?” “What extra value justifies each step up?”
15	**Unsure it’s profitable**	***Ask yourself***	“What will this really take, including the hours the client never sees?” “At what fee would I be glad, not just willing, to do this work?”
16	**Unsure about fit**	*Ask the client*	“How do you like to work with outside advisers?” “Tell me about a supplier relationship that worked well, and one that didn’t.”
17	**Delivery team unclear**	***Ask yourself***	“Who do I need, and are they available when the client needs them?” “What would I have to say no to in order to do this well?”

Want help putting a value on your work?

I’m Morton Patterson, a strategic adviser to professional services leaders and a Marshall Goldsmith certified executive coach. Knowing your value underpins everything I do with clients: if you can’t articulate, evidence and price the difference you make, growth stays harder than it needs to be.

Explore the Know Your Value workshop at **mortonpatterson.com/workshops**, book a conversation at **mortonpatterson.com/contact**, or email **value@mortonpatterson.com**.