## STRATEGY 9: FORM PROFITABLE STRATEGIC PARTNERSHIPS

## Email Sample of Monthly Meeting Confirmation

To make each monthly meeting with your strategic partners as productive as possible, always send a confirmation email as soon as you have scheduled a monthly meeting. In addition to confirming the date, time and location of the meeting, your email should also:

* Highlight any significant results you discussed in the previous meeting
* Summarize actions that both parties committed to take before the next meeting
* State your goals for the next meeting

Below is a sample of such an email.

Dear Jane,

As always, it was great meeting with you today. It’s terrific to see our efforts resulting in some new business activity for both of us.

This email is to confirm our next meeting on Friday, November 8, at 1:30 at your office.

Here’s a quick summary of where we stand now:

* You brought in one new business owner client over the last month as a result of a thought leadership piece you sent to him.
* You scheduled three meetings with potential clients who have expressed an interest in engaging you.
* Over the next month, you will contact the eight clients and prospective clients with the thought leadership content we discussed.
* We identified two clients who would likely be suitable for my services. You’ll make these referrals and I’ll follow up with each promptly.
* I’ll organize my new thought leadership content and have it ready for your review at our next meeting.
* At the next meeting, we’ll continue our process of looking at our past results and then matching the right clients to the right thought leadership content.

I’ll look forward to seeing you next time. Of course, if you have anything you’d like to discuss in the meantime, please don’t hesitate to contact me.

Best of success,

James Advisor