



# Eight Steps to Prepare for Your Informational Meeting

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Your invitation for an informational meeting has been accepted! Now it is time to prepare for your meeting.

It's important to remember that you are the one asking for the meeting and therefore, you set the agenda. It's up to you to develop questions to acquire the information you need to help with your career.

If you do this right, your initial informational meeting could be the beginning of a long-term professional relationship with the person you are meeting. You want to make a good impression by sounding interested, enthusiastic and smart.

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## 1. Do Your Research

Before you invite someone to meet with you, learn everything you can about the person. Start with a Google search. Has the person or their organization been in the news? Have they recently been quoted in a professional journal or online newsletter? Most people are flattered when new colleagues mention a quote or comment of theirs that received positive press. Additionally, doing so also makes it clear you are on top of industry news.

Review the LinkedIn profile, Twitter stream and even Facebook pages owned by the person you will be meeting. Focus first on professional information: Learn where the person attended school, where they worked, what associations they belong to and any other volunteer organizations they may be affiliated with.

If the person you are meeting with is an alum, see if their LinkedIn profile mentions anything about courses they took or clubs they belonged to. (Don't forget to make sure you have a complete LinkedIn profile and a professional online presence in case anyone is researching you!)

Look for some common personal touch points. Are there any common connections? Do potential contacts belong to public, online group-focused hobbies you enjoy? Make a note of any potential talking points.

## 2. Plan How You'll Start the Conversation

If you're uncomfortable meeting new people, advance research and planning will help you feel more prepared and confident.

Use something from your research to start the conversation or you could choose something lighter such as the weather, local events, or the venue where you are meeting. The purpose of this small talk is to start building rapport with the individual you are meeting with. This helps set the tone for the meeting and helps the person begin to understand your personality.

Maybe the person enjoys playing tennis and you do, too. Work the topic into the conversation. It's not necessary to say, "In researching your background, I noticed you enjoy tennis; so do I." Even in an age when it's easy to find out anything about other people, this might seem a bit aggressive. Instead, once niceties have been exchanged, feel free to comment, "Wow... This weather is great for tennis. I hope it lasts until the weekend." The new contact will likely pick up the topic and presto — a natural conversation ensues. ►



### 3. Review Your Purpose for the Meeting

Before you reached out to request the meeting, you defined what you wanted to accomplish in meeting with this person. Go back and review what you asked for. What knowledge or information does the person you are meeting with possess? How will their information help you? The questions you ask during the meeting will be determined by who you are meeting with.

For example, if you are meeting with an alumni who works in a role you aspire to be in, learn about the role and how the person landed it. If you are meeting with someone who works in a company you are interested in, you could ask about the company culture, the systems and processes the company uses and the hiring process. Below you will find a list of questions you can modify to suit your situation.

### 4. Set the Agenda

You probably asked for a 20-30 minute meeting. The time will go quickly so you'll want to set an agenda to keep you on track. Here's a general outline for you to follow:

Agenda Item	Time
Greetings, small talk	3-5 minutes
Your pitch and purpose of the meeting	3-5 minutes
Ask questions	15-20 minutes
Thank you, ask for other contacts, offer help	3-5 minute

### 5. Be a Good Listener

For some people, it's natural to do a lot of talking. If you're one of these people, or you know you get nervous and talk incessantly, be sure you plan ahead to ask plenty of questions. Most people like talking about themselves. Be the person who wants to know more about new contacts. Nod, smile, and you will leave a good impression. A good conversation where the other person feels valued and heard is likely to lead to another meeting. A great way to do this is to use the phrase, "Tell me more about..." which keeps them talking and shows you are listening and interested.

### 6. Avoid Asking for a Job

Don't forget, while it may seem counter-intuitive, you should avoid asking for a job when meeting people for the first time. Make a point to have an engaging conversation about the person's work experience and learn from them.

### 7. Practice Makes Perfect — Practice!

If talking with strangers is uncomfortable, spend some time role-playing with friends or in front of a mirror. Make a list of things to say. It helps to prepare to discuss topics that are trending. See the latest movies, read books, and read the business press and public filings about the company and industry before the meeting. Avoid talking about politics and religion.

### 8. Send a Thank-You Right Away

To show your gratitude, express thanks to the person who graciously took the time to share information with you. Your message should be sent while the meeting is still fresh in your mind and the mind of the person you met with - 24-48 hours is a good rule of thumb. Not only are you thanking the person for their time, your message also helps cement the relationship so you may ask for a favor in the future.

Anyone can send a "thank you for your time" message, even though few job seekers do. Invest the extra effort to explain why the meeting was helpful and how you plan to follow through on the advice provided. It proves that you were listening. ►



### Questions to Ask During an Informational Meeting

Consider Asking	To Learn About
1. What attracted you to the career?	How does this career match your expectations?
2. What previous experiences helped you most in this role?	What experiences can you acquire or do you have that are similar?
3. What do you need to know or what you should prepare to be successful in the role when you first started? What's one thing you wish you knew about this role/company before you started?	What do you need to know or what to prepare for to be successful in the role.
4. What have you found to be most rewarding about this work?	What are the intrinsic or extrinsic motivators in this type of work?
5. What's most important to prepare for a role like yours?	What skills, knowledge or competencies do you need to develop?
6. If you could go back and do anything differently in this career path, what would you do?	Is there another way to enter into this career?
7. Tell me about your company.	What are their goals, concerns, values, needs?
8. What is happening in the industry?	What do they think is important for you to know?
9. What exactly do you offer your clients or customers?	What is the technical language used in their business?
10. What is the history of this industry locally and how was this business started?	How does their company fit into the larger industry picture?
11. What are the most significant factors affecting your company today?	What are the outside circumstances affecting their company?
12. How have changes in technology most affected your business? How has your business/industry been affected by the past economic climate?	How are these factors affecting their present hiring needs?
13. How has your company grown or changed in the last couple of years?	How has the direction of the company affected its hiring needs?
14. What future direction do you see the company taking?	Have these changes increased or decreased the need for staff?
15. What is the greatest demand for your services or product? Which department feels it the most?	Where are the greatest possibilities for employment in this business? How would employment in these areas add to the growth of the company?
16. How do you differ from your competition?	What services/products are they most proud of? How do they perceive themselves in the marketplace?
17. Describe your star employee. What are the qualities of people who perform best in this business?	What does this company need from its employees and how can I address those needs before they show up as job postings?
18. How do you think most of the employees would describe this workplace?	What kind of environment has this company created for its employees?
19. How would you describe your company culture?	What is their perception of the kind of workplace it represents?
20. What type of personalities fit in best at your company?	What is the company's culture/values?
21. What trends do you see in the future that will affect your organization and industry? What do you think the company will look like 5 years from now?	How will the company's planned growth affect its hiring needs?
22. Who else would you recommend that I speak with about this career/company?	Acquiring referrals is an important part of networking plus this question helps you determine how well the person trusts you.



### Job Search Related Questions

- Would you look at my target list and tell me if you have any contacts in these companies?
- Can you name other companies that might be interested in someone with my background?
- Do you know the names of any good recruiters who specialize in this field?
- Do you have any ideas about industry associations, or strategies I may not have considered?
- Do you know the names of any industry specific websites I could investigate?
- Can you suggest what other positions might match my skills and background?
- What is the best way to get noticed as a candidate with your company?

### Your Meeting Outline

Background Information	
Name:	
Title:	
How long with current company:	
School(s) attended:	
Major accomplishment:	
Associations, clubs, activities:	
Who referred you:	
Why:	
Meeting Agenda	
Your pitch and value proposition:	
Questions to ask	
Names acquired	
How can you help?	
Action items post meeting	





## Thank You Template and Sample Messages

Your message will be concise and can usually be conveyed in three paragraphs. The first paragraph says thank you. The second paragraph explains why the meeting was beneficial and any follow-up actions you plan on taking. The third and final paragraph says thank you again, and you may choose to ask if it is ok to keep in touch or ask follow-up questions.

Keep these points in mind when creating your message:

- Templates are great, but your thank you message must be unique to your informational meeting.
- Keep the tone formal, remember this relationship could result in a job offer one day.
- Take the extra time to make sure your message, free of grammar or typographical errors.
- If you were referred by someone, be sure to follow-up and send them a thank you message for the introduction and give a brief summary of your take-away from the meeting.

You will find a template and several examples at the end of this tip sheet.

Subject line: Thank you for your time

Dear [Mr./Ms.] [Last Name],

First paragraph: Thank the person for their time, sharing their expertise, insight, knowledge or information. Also reference the type of information shared. Was it company information, career information, job search guidance, information about job skills or experience needed, or some other topic.

Second paragraph: Explain what you gained from the informational meeting and how it will help your job search or career. If you received actionable advice or recommendations, include what actions you have taken as a result.

Third paragraph: Thank the person again for their time and express the desire to keep the lines of communication open in the future.

Sincerely,  
Your Name  
Phone number  
LinkedIn URL

### Example 1:

Dear [Mr./Ms.] [Last Name],

Thank you for taking the time to meet with me to discuss your career at [Company Name]. I enjoyed meeting you and learning about how you navigated into your field after business school.

Based on your recommendation, I have already contacted the local chapter of ABC professional association regarding membership. I'm looking forward to my first meeting next month.

Again, thank you so much for your time! I look forward to keeping in touch.

Sincerely, ►

**Example 2:**

Dear [Mr./Ms.] [Last Name],

Thank you for meeting with me to discuss your experience in [Industry]. I appreciate your time and the insight and information you shared with me.

I was especially interested in learning about [choose a something from the conversation] and the way it affects [Industry] employees. I am even more excited to begin a career in this area of work, and I feel that the information you shared has helped fill some gaps in my knowledge of [role or industry].

Again, thank you for your time and I look forward to keeping in touch. If there is anything I can do to help you, please don't hesitate to reach out!

Sincerely,

**Example 3:**

Dear Mr./Ms. Last Name:

Thank you for speaking with me today. Your insight into [career field, company culture, or whatever was discussed] was truly helpful. The information you shared has confirmed my decision to gain additional work experience in [the field or role] before aiming for a more senior role.

I am looking forward to receiving the newsletter from [name of resource] and I'm certain the information will help me become more familiar with the industry. I've also bookmarked the websites you suggested for industry developments.

I will follow up in the near future to let you know about my progress. Thank you again for your assistance.

Sincerely,