



Eight Tips for Requesting an Informational Meeting

What will you say to someone you barely know that will convince them to meet with you – either face-to-face or on the phone – for 20 to 30 minutes?

Keep these eight tips in mind and you'll be on your way to successfully set up informational meetings!

When you request an informational meeting — not a job interview — follow these eight tips:

1. Ask People You Know for an Introduction

The first thing to keep in mind is that you really shouldn't reach out to people you don't know. Instead, ask people you know for an introduction. A warm referral will result in a higher response rate and improve the chances that the person will agree to meet with you.

2. Request Information and Insight, Not a Job

You aren't asking for a job. You are seeking information and insight; consider your quest a research study into a career path. It is up to you to make it clear you want to learn from the person, and that you are asking for advice, information or recommendations. When you are making the request to meet, don't call it an informational interview. It isn't really an interview. It is a conversation. And people have meetings all the time.

3. Explain the Purpose of the Meeting

The reason you want to meet with the person depends on who they are and what they do. If the person holds a role you are interested in, then your purpose for wanting to meet is to learn, first-hand, what the job really entails, what skills are most important or what additional training or certification is helpful. If you're asking to meet with someone who works for one of your target companies, then you will want to learn what it's like to work there. What is the company culture, what types of projects might you be working on or what types of clients will you be serving.

4. Prepare for Likely Objections

Before you pick up the phone, develop a script or bullet points so you'll be prepared to introduce yourself and explain specifically what you are asking of them. Being prepared should make you more confident. The more often you do this, the easier it will get.

You will encounter people who don't know how to help you and they may make excuses for not meeting with you. What they are really saying is that they are not comfortable enough to schedule a meeting with you at this time. They aren't always saying no. Prepare responses ready for these common objections so you'll be able to continue the conversation:

"I don't know of any jobs"

"I don't do the hiring"

"I'm too busy"

Your response might be: ►



“I understand, but I am actually looking for people to have a conversation with so that I can learn more about XYZ company (Q industry or P occupation). I’m not expecting a specific opportunity as a result of our conversation. If you were me, who do you think I should speak to?”

It’s important to put the needs and interests of others first. When asking for a meeting, you’ll want to allocate this into your invite as well. How would the person benefit by meeting with you? How can you help him or her?

5. Be Crystal Clear and Truthful

You are asking for a short meeting, 20-30 minutes. Most people can fit this into their schedules either before work, during lunch or after work.

Your request for a conversation must be sincere and free of hidden agendas. You will not ask for a job, you won’t even mention the word job during your conversation. To help you secure the meeting, make sure you are crystal clear about the topics you plan on covering, types of questions you’ll be asking and your expectations for the meeting.

6. Face-to-Face

If logistically possible, request a face-to-face meeting at a place that is convenient for the person you are meeting. Face-to-face meeting is more likely than phone to forge a connection and build a relationship. If distance does not allow for an in-person meeting, so set up a call, with video if that is acceptable to you both.

7. Tell Them Who You Are

While your message will include a link to your LinkedIn profile, you must also include a short sentence or two summarizing your background. The key is to keep this concise. Only include the most relevant information. This is a written version of your shorter pitch. You can also share your succinct value proposition.

Your value proposition focuses on the problem you will solve for a potential employer, not what you need or want. For example, a value proposition may look like this:

“I strategize new business growth for insurance companies by helping them target and engage with the right potential market.”

8. Craft A Winning Request

Email is the preferred method for making the request for an informational meeting. Everyone uses it and checks it multiple times a day, which means your message is more likely to be seen. Sending a LinkedIn message asking for an informational meeting should be a last resort. When crafting your message, you will want to keep these important points in mind:

- a. **Use an Interesting subject line.** The subject line is your chance to entice or convince the reader to open your message. Make it clear and compelling. If possible, include the name of the person referring you.
- b. **State how you know the person.** Including the name of a mutual connection makes your message seem less spammy and since you both know the same person, it’s more likely you’ll get a response.
- c. **Explain why you want to meet.** By explaining what your purpose is for wanting to meet, you are clear and truthful.
- d. **Suggest meeting dates.** You want to make it easy for the person you are contacting to respond, and the less back and forth required to pin down a date, time and location, the better.

You’ll find a template for a meeting request which can easily be updated to include the appropriate information. ►



Meeting Request Message Template

Subject: Jim Smith recommended I reach out to you

Dear [MR./MS. LAST NAME OF PERSON]:

I received your name through [NAME OF SOURCE] as someone who would be knowledgeable of industry trends and life at [COMPANY NAME]. I am interested in meeting with you to learn about the culture at [NAME OF COMPANY] and what trends you are seeing in your area of expertise [OR SPECIFIC AREA IF KNOWN].

I'm currently attending (or I graduated from) [NAME OF SCHOOL] and am interested in [CONCENTRATION/TYPE OF ROLE].

I've had success [INSERT VALUE PROPOSITION].

I realize your schedule is probably very busy, however, I was hoping you would have 20-30 minutes to meet sometime within the next couple of weeks [OR INSERT A COUPLE OF DATES]. I'm flexible and able to meet at a time and location convenient for you.

I will follow up with you to see what might be convenient, and thank you again for your consideration.

Regards,
Your Name
Your Email
Your Phone number
Your LinkedIn profile URL

Sample Meeting Request Message

Subject: Referred by Nancy Jones for an Informational Meeting

Dear Mr. Smith,

Nancy Jones of [company name], suggested I contact you to discuss your work.

As an editor/writer for Alexandria's city magazine, I've developed my talent and experience as a public relations writer. Because the staff is very small, I've worn a number of hats, including: developing the editorial format and individual story concepts, writing numerous articles, editing copy, laying out the magazine, and supervising production.

I am eager to learn about your successful career path at XYZ company. I will call you the week of April 25th to see if we can find a mutual date and time to get together.

I appreciate your guidance.

Cordially,
Jane Doe
Email
Phone number
LinkedIn URL