CLIENT MEETING AGENDA

**Date of Meeting:** [date]

# Meeting Participants

From Our Organization: [list members of your organization with job title] Client/Customer/Lead/Prospect: [name of contacts, their organization and job title]

# Scope of Meeting (check one)

* Introduction Meeting
* Consultation
* Sales Presentation
* Product Demonstration
* Proposal Discussion
* Onboarding and Pass-off Meeting
* Customer Check-in or Renewal Meeting

# Pre-meeting Notes

Lead Source: [where the lead or customer came from]

Product(s) or Service(s) of Interest: [Description of specific product or service being discussed

or that would likely make most sense for the lead]

Previous Interaction (If Any)

* Date: [date of last interaction]
* Type of Interaction: [type of interaction such as phone call, email, trade show, or one of meeting types above]
* Description: [discussion, notable interaction details, follow-up tasks following the meeting]

Other Insights From Research

* Other Potential Decision makers (Y/N)?:
* Any Mutual Connections (Alma Mater, Interests, Friends, etc)?:
* Current Product/Service Provider?:

# Meeting Notes

Preset Questions

* [Insert Question]? **→** [Answer Notes]
* [Insert Question]? **→** [Answer Notes]
* [Insert Question]? **→** [Answer Notes]
* [Insert Question]? **→** [Answer Notes]

Current Provider Information (If Needed)

* Provider Name:
* Specific Product/Service:
* Current Cost:
* Likes About Provider:
* Dislikes About Provider:

Lead Qualification (If Needed)

[Insert BANT Checklist Link]

Other Relevant Notes

[Insert other insights from meeting]

# Follow-Up Tasks

* [Task Description]
  + Completed by: [Person Responsible]
  + Date to Be Completed: [Date]
* [Task Description]
  + Completed by: [Person Responsible]
  + Date to Be Completed: [Date]
* [Task Description]
  + Completed by: [Person Responsible]
  + Date to Be Completed: [Date]