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]