



Client Meeting Preparation Template

GENERAL MEETING INFORMATION	
Who are you meeting with [client organization, name(s) and role(s)]	
Who from your firm will attend:	
Date/Time of Meeting:	
Location:	
Any equipment needed?	
Who will be responsible for taking notes?	
Who will watch for non-verbal communication?	

	Attendee 1 - Name	Attendee 2 - Name	Attendee 3 - Name	Attendee 4 - Name
What do we know about the people in the meeting?				
What are each individual likes/dislikes? Both professional and personal.				
What are their hot buttons?				
Other?				

Objective(s) of the meeting:	
Question	Who will ask?
1.	
2.	
3.	
4.	
5.	



TASK TO BE COMPLETED AFTER THE MEETING	Responsible
Record notes in client management system	
Report back to the rest of the client care team on outcomes	